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The
FOOD MARKETING
Industry Speaks

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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,500 members—food retailers and wholesalers and their customers. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of $140 billion—half of all grocery sales in the United States. More than three-fourths of the FMI membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 100 members from 40 nations.

The Food Marketing Industry Speaks

In 1984 the United States economic figures were, in many cases, the best in decades. Gross National Product increased at a rate of 6.8 percent, its best performance in 34 years. At the same time the Consumer Price Index remained low with an increase of only 4.3 percent. The unemployment rate, another key economic factor, declined steadily in 1984 and was coupled with an all-time high in civilian employment of 106 million people. Another record breaking figure in 1984 was business productivity which rose at 3.2 percent for the year, the sharpest rise since World War II.

The strength of the United States economy in 1984 was also reflected in the year's economic figures for the food distribution industry. In 1984 the industry showed increases in gross margin, net profit, weekly store sales, and wholesale sales. Retail sales were one of the few economic measures to show a decrease, declining in both real and current dollars.

The Food Marketing Industry Speaks 1985 report examines all the interdependent parts of our industry that work together to put food on the dinner tables of America: the food producer, the manufacturer, the wholesaler, and the retailer. It begins with a review of the economy in general with an in-depth look at those aspects which affect our industry directly. It covers sales and profit trends, and provides a detailed look at several special interest areas.

Highlighted this year, for example, are distribution centers—both wholesale and retail, for dry grocery and frozen food centers. The report also examines in detail the meat department, the seafood department, electronic funds transfer, and productivity by store type.

Much of the data are compiled through FMI's annual surveys of the industry. FMI gratefully acknowledges all those companies who have contributed their time and effort to fill out the questionnaires. A detailed explanation of the study is provided in the appendix.

Industry information is also drawn from other FMI research reports such as *Operations Review* and *Facts About Store Development*. The Institute would also like to acknowledge data gathered from *Forbes Magazine*, the U.S. Departments of Agriculture and Commerce, and many other business and government publications.

While this report contains the complete analysis for 1984, it does not include the cross tabulations of survey data from which this analysis was developed. This information, providing a more thorough look at industry activity, is contained in a separate, supplemental report entitled *Detailed Tabulations* from the *Food Marketing Industry Speaks, 1985.* Another publication, *Trends — Consumer Attitudes and the Supermarket, 1985,* parallels *Speaks* by presenting the state of the industry from the consumer side. *Trends* explores consumer attitudes toward the economy and the supermarket, and analyzes changes in consumer concerns and shopping patterns.

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In 1984

Retail Sales Gain Over Previous Year	7.3%
Wholesale Sales Gain Over Previous Year	6.8%
Weekly Sales Per Square Foot	$8.00
Sale Per Customer Transaction	$15.36
Sales Per Labor Hour	$90.85
Gross Margin With Warehouse	24.1%
Gross Margin Without Warehouse	21.6%
Net Profit (before taxes)	1.6%
Weekly Store Sales	$175,900

These operating results are typical of FMI's member supermarkets. They represent average performance based on data from a cross-section of our membership.

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Economic Climate

The year 1984 produced aggregate economic numbers which were quite good by any standards. But these averages mask a recovery with very definite regional patterns, a troubled farm sector, and cracks in the traditionally solid financial community foundation. Beginning in mid-1982 our current recovery has produced:

- The greatest GNP increase in the last five recoveries. The American economy expanded at a 6.8 percent rate for the year, its best performance in 34 years.
- The lowest increase in inflation in the last three recoveries. The vigorous expansion was accompanied by a steadily declining inflation rate. At 4.3 percent, the 1984 Consumer Price Index increase remained low, while large productivity gains were taking place at the same time.
- The highest level of total civilian employment ever recorded. More than three million more people found jobs last year, bringing total civilian employment in 1984 to an all-time high of over 106 million people. The unemployment rate also declined steadily throughout 1984 to reach 7.5 percent for the year, back to a level approaching 1980-81 unemployment rates.
- The greatest jump in consumer spending in the last five recoveries. In deflated dollars, the biggest rise in disposable personal income in two decades—6.8 percent—occurred in 1984. Per capita disposable income, the amount of money available after taxes, was almost $11,000 per person, in current dollars.
- Business productivity figures that broke Labor Department records. The "productivity index" measures efficiency in terms of the volume of goods and services that the economy produces in an hour of paid working time. Total business productivity rose 3.2 percent for the year, the sharpest rise since World War II.
- And, finally, by far the greatest increase in business investment in the last five recoveries. High internal rates of return have prompted businesses with good cash flows to invest in real assets such as plant and equipment.

By many measures, this recovery has robustly outperformed its predecessors. And it's still relatively young in historic terms, leaving room for further growth.

But there were some soft spots. For starters, the strong dollar and resultant weak export market caused heavy industry to lag behind in this recovery. Many of these same areas of the country were also hard hit by agricultural stress.

Farmland prices peaked in 1981. After three decades of increase, declines of almost 30 percent are now common in the Corn Belt and Upper Midwest. The U.S. Department of Agriculture, in assessing the severity of financial problems, now classifies 6.6 percent of all farms as "very highly leveraged," and an additional 11 percent as "highly leveraged." This totals to less than 20 percent of all farms, but regional concentration magnifies the problem.

A more recent problem has been

the early 1985 failure of the Ohio Deposit Guarantee Fund followed by the failure of two government securities dealers — one in Florida and another in New Jersey. None of these failures seem likely to multiply, but they have certainly injected a new mood of caution throughout the financial community.

Food Production

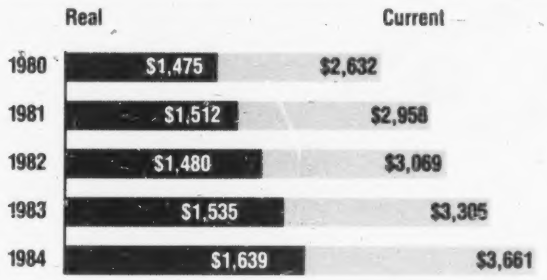
The strong harvests of 1984 underpinned a rebound for agriculture last year following 1983's devastating performance. The combined impact of the PIK (Payment In Kind) program and the summer drought made 1983-84 the worst crop year for farmers and rural communities in modern memory.

Soaring corn harvests in 1984 led crop production's turn from 1983 lows. Although corn production did not come back up to 1981-82 levels last year, excellent conditions enabled farmers to harvest 106.6 bushels of corn per acre, which were in line with 1981-82 levels and way ahead of 1983's low 81.1 bushel level. This meant that corn prices returned to 1981-82 levels of about $2.70 a bushel, compared to $3.25 in 1983.

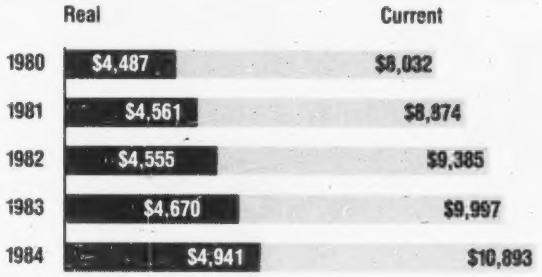
Although wheat production did not return to the high levels of 1981-82, it topped 1983 figures. Coffee production exceeded 1983 levels with 12.38 billion pounds this year, compared to 11.88 billion pounds.

For the year, beef and poultry production made slight gains, however, pork and milk production both declined. Less milk-per-cow and fewer cows set back milk production. Strong poultry prices and lower feed costs helped poultry production maintain an eight-year track record of continued growth.

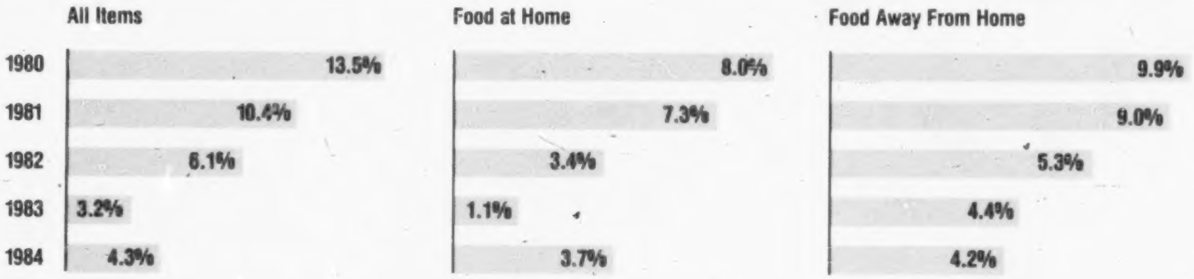
Gross National Product (Billions)



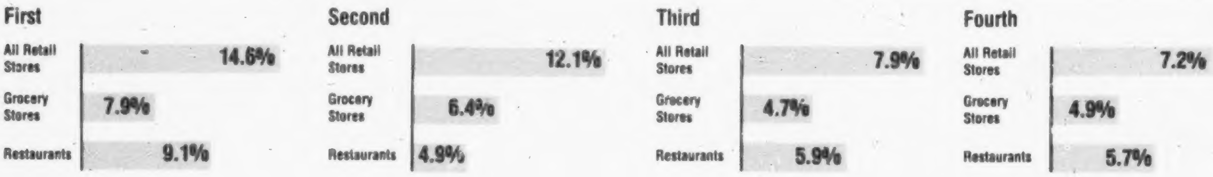
Per Capita Disposable Income



Consumer Price Index



Sales Increase Over '83 By Quarters



Wholesaling

In current dollars, sales increases for wholesalers averaged 6.8 percent in 1984, slightly below retailer gains but a strong rebound from the 4.1 percent level of 1983. However, in deflated dollars, wholesale sales increases managed to keep pace with 1983's increase at 3.0 percent.

The average sales per retail store served increased again in 1984. In 1984 it was $2.21 million and in 1983, $2.18 million. The services most often offered by wholesalers to their members included an advertising program, individual retail pricing, product movement data, and handling of generic label stock. Almost 97 percent of the wholesalers offered these services. Equipment procurement, handling of private label stock, and gross margin reports by item were offered by more than 90 percent of the wholesalers.

Services Provided to Membership

Advertising Program	96.8
Individual Retail Pricing	96.8
Product Movement Data	96.8
Handle Generic Label	96.8
Equipment Procurement	93.5
Handle Private Label	93.5
Gross Margin Report By Item	90.3
Real Estate & Store Engineering	80.6
Retail Accounting	74.2
Interior Decor & Design	74.2
Discount Programs	74.2
Education/Training	67.7
Member Payroll	67.7
Scanning Support	64.5
Equipment & Fixture Financing	58.1
DSD System	58.1
Lease Financing	54.8
Space Allocation	51.6
Other	3.2

Retailing

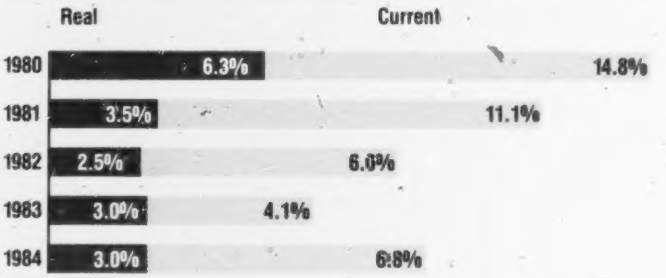
Total retail sales increased 7.3 percent in 1984, slightly behind last year's pace. That figure translates to 3.5 percent when adjusted for inflation. Although sales volume continues to grow, the percentage increase from year to year has declined each year since 1980 in current dollars. In deflated dollars it has declined from 1983 to 1984.

For identical stores (stores that were in operation in both 1983 and 1984), the sales increase was a positive 1.8 percent in real dollars and 5.6 percent in current dollars. The rate of growth has decreased in current dollars every year since 1978. It also decreased in real or deflated dollars compared with last year. When we look at total sales versus identical sales, we can see that a substantial amount of total sales growth continues to be the result of sales generated by new stores. This may indeed be a mature industry. But it is far from stagnant.

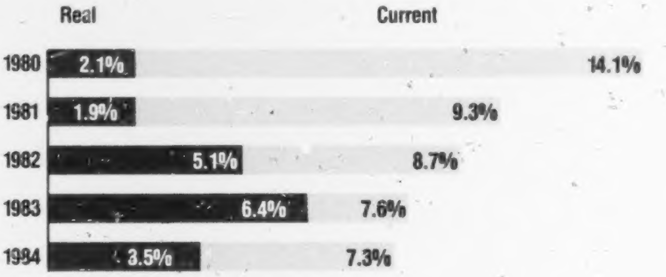
The "eating-out boom" of 1982-83 appears to have peaked, according to Department of Commerce statistics on restaurant sales. From a high gain of 13.6 percent in early 1983, restaurant sales increased only 5.73 percent in the fourth quarter of last year. There is some indication that March eating and drinking place sales were strong, but first quarter 1985 government figures show only a 3.5 percent sales gain versus a 10 percent growth rate for the first quarter of 1984.

According to the annual *Forbes* study of industrial performance, the supermarket industry's return on equity was 13.3 percent for 1984, a five-year low. This drop reflects both the tough competitive conditions in our industry and the increasing investment in large new stores. Return on equity measures net income as a percent of the owners' investment. Overall, the *Forbes* study ranks supermarket return on equity 14th out of 42 major industries over the last year.

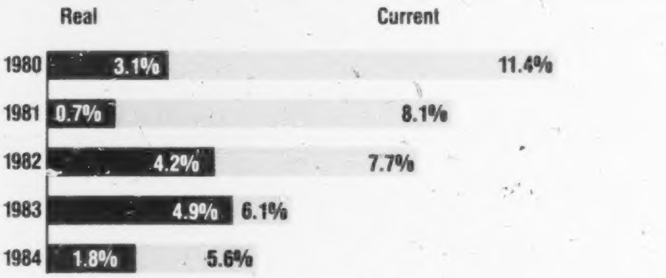
Wholesale Sales Increase



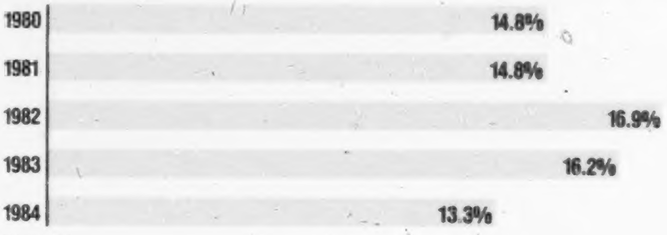
Retail Sales Increase



Identical Store Sales Increase



Return on Net Worth*



*Source *Forbes*

Company Performance

muffins
cookies
muffins
pastries

Gross Profit Margin

Gross profit margins, total sales minus the cost of goods sold, continued their upward trend again last year as cost pressures continued; with 24.13 percent for companies with warehouses and 21.64 percent for companies without them. These figures compare to 23.72 percent and 21.50 percent respectively in 1983. The store-door margin, which represents gross margin minus warehouse and delivery costs, extended its record to five years of consecutive increases, with 20.17 percent in 1984 compared to 19.41 percent in the previous year.

Net Profit Margin

The net profit margin, before taxes, was 1.6 percent in 1984, the highest it has been since 1979. Net profit margin is calculated by dividing net profits by net sales. Quarterly net profits showed the third and fourth quarters to have been the most profitable.

Productivity

Reflecting the pace of new store construction, the typical supermarket in 1984 measured 29,600 square feet and carried an average of 15,379 items, costing an average of $1.34 each. That compares to 28,000 square feet of total space, containing 16,719 items, averaging $1.28 in 1983. Our supermarkets continue to grow in size and diversity.

Combination stores led with 48,409 square feet and 23,000 items carried at an average price per item of $1.36. Combination stores were followed in size by super stores with 36,000 square feet; warehouse stores, 31,750 square feet; and conventional stores at 18,125 square feet. At a distant second to combination stores, super stores carried an average of 16,375 items; tied for third place, conventional and warehouse stores carried an average of 12,500 items. Combination stores were the only store type to top the industry average of $1.34 retail price per item. For super stores the average price was $1.24. For conventional stores it was $1.23 and for warehouse stores it was $1.18.

Percentage of Operation Supplied by:

	All Companies	Larger Retailer	Independent
Own Warehouse	65.3	67.0	16.3
Voluntary Wholesaler	3.8	3.3	23.0
Cooperative Wholesaler	3.6	3.1	22.0
Unaffiliated Wholesaler	2.1	2.0	9.7
Direct Vendor Deliveries	24.8	24.2	25.2

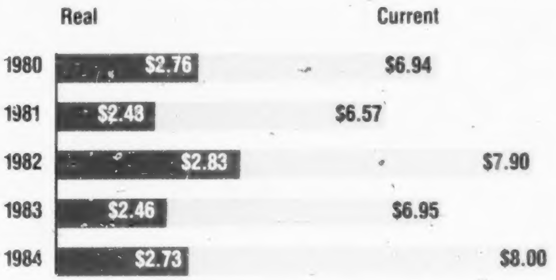
Combination stores also led in weekly sales with $301,669, followed by super stores, warehouse stores, then conventional stores. Typical weekly sales per supermarket were $175,900 in 1984. 1984 marked the first time the high end of the middle range broke $200,000.

The typical sale per customer transaction was $15.36, compared to $14.60 in 1983. It went up in both current and deflated dollars. Warehouse stores took top place with a typical transaction per customer of $21.92, one of the real success secrets of this format.

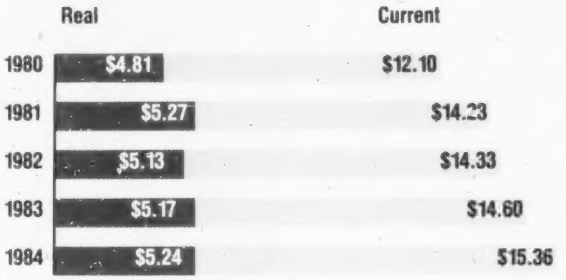
At $90.85, typical sales per labor hour nearly held steady in current dollars but decreased in deflated dollars. Warehouse stores reported the highest sales per labor hour with $128.63, down from $130.80 last year. Super stores had $86.22 and conventional stores reported $84.38.

Weekly sales per square foot of selling area increased to $8.00 in current dollars, up from $6.95 in 1983. When adjusted for inflation the figure also increased. Combination stores had the highest average weekly sales per square foot, followed by warehouse stores, super stores, then conventionals.

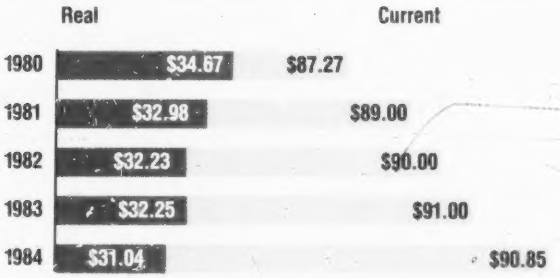
Sales Per Square Foot



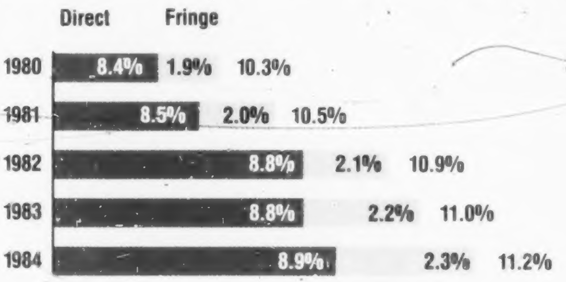
Sale Per Transaction



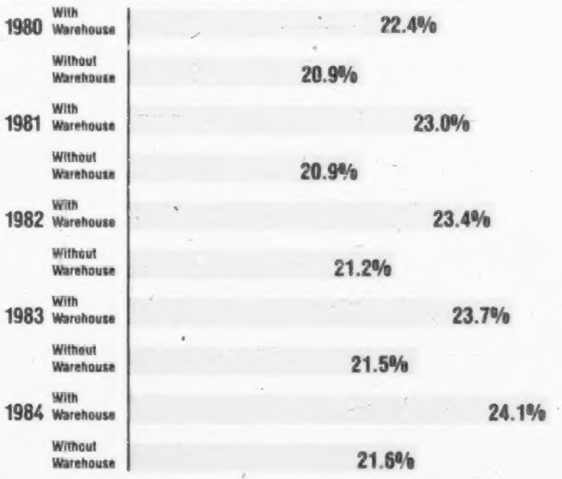
Sales Per Labor Hour



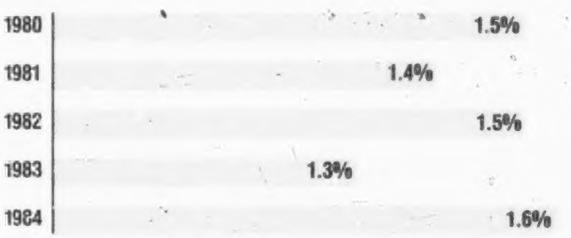
Total Store Labor Cost



Gross Profit Margin



Net Profit Margin before taxes



Distribution Centers

Dry Grocery Distribution Centers

Frozen foods centers' larger counterparts, dry grocery distribution centers, typically measured 271,000 square feet and stocked 5,822 items. Unlike frozen food distribution centers, dry grocery retail-operated centers were smaller than wholesale-operated centers.

The dry grocery distribution center typically received 190 truckloads a week and had just under 200 outbound loads among the 75 supermarkets it served. This typically added to almost 200,000 cases shipped per week. The typical number of inbound rail cars per week continued to decline. In 1984 it was six; in 1983, 12; and in 1982 it was 15. Eighty-four percent of the time, dry grocery items were manually selected, with select-to-conveyor used 15.5 percent of the time. The majority of dry distribution centers operated two to three shifts per day. Typically the dry grocery distribution center had 107 employees, with the middle 50 percent of the responses ranging from 59 to 155.

Frozen Food Distribution Centers

Frozen food centers typically carried a thousand items. They shipped 80 cases per total labor hour and stored and replenished 360 cases per direct labor hour. Frozen food centers received 38 inbound truckloads in a typical week and were typically 38,256 square feet in size. Retail frozen food centers were typically larger than wholesale centers.

Frozen centers typically employed 18 people that worked two to three shifts per day. Eighty-one was the median number of supermarkets served by a frozen food distribution center. Inbound loads were received in the form of 38 truckloads and one rail car per week. Typically there were 45 outbound vehicle loads per week, with more than 400 orders processed per week.

Number of Shifts Operated Per Day in Distribution Centers

	All Centers	Wholesale Centers	Retail Centers
Dry Grocery			
One up to two	17.9%	7.9%	24.6%
Two up to three	52.6%	60.5%	47.4%
Three up to four	29.5%	31.6%	28.1%
Frozen			
One up to two	28.8%	12.5%	40.0%
Two up to three	57.6%	70.8%	48.6%
Three up to four	13.6%	16.7%	11.4%

Microcomputers

The backbone of the food marketing business, distribution centers are adapting to the high-tech eighties like the rest of the industry. Over half — 58.1 percent — of all companies surveyed used microcomputers in their distribution centers. Microcomputers were most often used for spread sheet analysis, word processing, and productivity control. Over a fifth of the companies linked a majority of their computers with an in-house network.

Use of Microcomputers in Warehouses

Spread Sheet Analysis	61.9%
Word Processing	52.4%
Productivity Control	52.4%
Labor Standards	38.1%
Inventory Control	33.3%

Employee Incentives

Slightly more than 32 percent of the non-salaried distribution center employees received incentives associated with work productivity. Almost 26 percent of the salaried employees and 21.6 percent of the truck drivers received incentives. Annual performance reviews, annual merit increases, time off with pay, and gift awards were the most often offered incentives for retail companies. The most often given in wholesale companies were annual performance reviews, gift awards, special-purpose cash awards, year-end bonuses, and contest awards. For all companies cash awards accounted for 88.9 percent of all incentives and non-cash accounted for 11.1 percent.

Percentage Of Companies Offering Incentives

	All Companies	Retail	Wholesale
Salaried Warehouse Employees	25.7%	22.2%	31.0%
Non-Salaried Warehouse Employees	32.4%	33.3%	31.0%
Truck Drivers	21.6%	20.0%	24.1%

Average Total Area for Frozen Food Distribution Centers

Total Centers	38,256 square feet
Retail Centers	39,311 square feet
Wholesale Centers	30,000 square feet

Average Number Of Items Available— Frozen Centers

Total Centers	1,000 Items
By Size Of Center	
Less Than 10,000	237
10,000 - 19,000	900
20,000 - 39,000	907
40,000 - 79,000	1,019
80,000 or more	1,450

Leg of Lamb
Boneless
Marinated

Meat Department

The typical meat department took up 12 percent of total store selling area, while the portion of total store revenues generated from meat sales weighed in at 18 percent. However, this total revenue share was a decline from our 1981 survey figure of 20 percent. Red meat sales have declined as have total meat sales; but with the growth of poultry, pork, and seafood, we see little impact over time on the physical size of this department.

In 1984 a profile of the typical meat department looked like this:

- Five employees made up its staff. Smaller companies had four, and larger companies had six employees each. Wages, salaries, and fringe benefits accounted for 10 percent of meat department sales.
- The median meat sales per labor hour equaled $129 for all stores.
- Fresh meat, including beef, lamb, pork, and veal, accounted for more than half of all meat sales. Poultry claimed another 18 percent, processed and frozen foods another 23 percent, and fish 2.9 percent. Over 60 percent of beef was sold as boneless. In contrast, more than four-fifths of all chicken and pork products were sold as bone-in.
- Over 90 percent of ground beef was ground at the store.
- The most popular type of meat display was the multi-deck case. Four out of five companies reported using multi-deck cases for fresh meats. Multi-deck displays also stacked up well for processed meat cuts.

Food retailers are always in search of greater efficiencies. Regarding the meat department, this is reflected in a trend toward purchasing primals or subprimals instead of whole carcasses. This permits meat managers to buy the cuts their customers want, and in quantities they can sell. Smaller cuts also reduce the time required for in-store packaging. Most fresh beef today arrives at the supermarket as either subprimals or primals; with only 4.4 percent of stores reporting they received whole carcasses.

Open dating information on fresh

Percentage of Fresh Beef Sales By Type USDA:

Prime	1.3%
Choice	79.1%
Good	1.1%
Standard	.2%
Ungraded or House Brand	18.3%

Open Dating for Fresh Cut Meat

Sell By Date	63.9%
Better If Used By Date	.3%
Expiration Date	27.7%
Pack Date	8.5%
Not Dated	5.4%

Meat Related Customer Services Offered

Meat Recipes	87.6%
Store Coupons	79.0%
Nutrition Information	62.4%
Meat Charts	50.3%

meats has become accepted fare in many supermarkets as a way for both shoppers and stores to gauge the freshness of these items. On fresh cut meat packages, companies were twice as likely to use the "sell-by-date" method as the "expiration date." Private label, prepackaged processed meats also carried "sell-by-date" information slightly more often than "expiration date."

At stores that have scanning equipment, meat and seafood products were frequently among those items now being scanned. Seven out of eight stores (87.3 percent) that have scanning equipment included meat products in the items they scan at the checkout line. Those that did scan meat products, scanned about two-thirds of them.

Stores are also fond of boosting sales by offering customers meat-related services, often connected with display promotion. Meat recipes were the most popular such service, followed by store coupons for meat items, nutrition information, and meat-cutting charts and explanations.

Seafood Department

Practically all stores keep plenty of frozen seafood on hand. The big news in seafood in 1984 was that a whopping 85.8 percent of all stores included in our survey now carry fresh seafood — and in abundance. In fact, fresh seafood now accounted for nearly half of all seafood sales for stores that offer this category — 42 percent, versus 57 percent for frozen seafood.

Stores that carry fresh seafood typically stocked about 18 different items. The typical store's total number of seafood products — fresh and frozen combined — was more than 77. Frozen seafood was more likely than fresh seafood to be included in the meat department with 94.4 percent of the stores including at least some frozen seafood items in the meat department. Almost 39 percent carried some frozen items in the seafood department, and 17.9 percent in other departments. Four out of five stores (80 percent) scanned fresh seafood products and those that did, scanned 48 percent of them.

Delis

Delicatessens have been growing rapidly in almost all areas of the country, although they still lag in the Southeast. Only 3.4 percent of supermarkets in our national sample reported not having a deli. Almost three-quarters had a separate deli department, while another one-quarter included it as part of the meat department.

Electronic Funds Transfer

Decontrol of financial services and the shift in banks' focus to consumers has also brought the banking business into the supermarket. Automated teller machines were present in 15 percent of supermarkets nationwide. That number has nearly doubled since 1983's 8.4 percent and is up from 4.5 percent in 1982. Larger retail operators were twice as likely to have ATMs in their stores as independent store operators.

Supermarkets were compensated for having non-supermarket owned ATMs in their stores by receiving:

- A combination of space and transaction fees—44.6 percent;
- Transaction fees—43.9 percent;
- Space rental—3.8 percent;
- Other—7.7 percent.

Consumers used supermarket ATMs to conduct a variety of financial chores. More than three-quarters of the transactions were to dispense cash, up from 65.7 percent in 1983. Both balance inquiries and account/balance transfers were down compared to last year, and depositing money dropped off sharply. But one must remember that not all states allow deposits.

On a scale of one to five, with five being the most positive, retailers rated three ATM factors better than a "4": customer convenience, ease of use, and overall performance. Four factors ranged between "3" and "4", with only reducing store operating expenses falling below 3. The ratings did not vary much from the earlier study although some went up and others went down slightly.

As to the important question of the effect of ATM services on check and cash volume at the checkout counter, for the majority of stores the jury is still out. Cash volume at the cash register remained the same in 67.9 percent of companies with ATMs. Eighty percent of companies with ATMs reported no effect on check volume at the checkout counter.

Technological Developments

1984 and 1985 are proving to be years of great technological advancement for the food industry. Several industry studies were undertaken, with the objective of making the grocery industry's technological systems more efficient. Five of the major projects are the Direct Product Profit Study, the UPC File Maintenance Program, the Coupon Redemption

Percentage Of Companies Including Fresh Seafood Items In:

Seafood Department	50.2%
Meat Department	87.6%
Another Department	8.9%

Average Number Of Seafood Items Carried

Fresh Seafood Items	17.8
Frozen Seafood Items	57.8
Other Seafood Items	1.6
Total Seafood Items	77.2

Rating ATM Operation

Customer Convenience	4.1
Ease of Use	4.0
Overall Performance	4.0
Hardware Reliability	3.9
Maintenance	3.8
Customer Acceptance	3.5
Customer Usage	3.2
Store Savings	2.8

*1 Indicating Poor and 5 Indicating Excellent

ATM Ownership

Third Party Service/Provider	37.4%
Bank	34.2%
Supermarket Company	19.0%
Other Financial Institution	2.1%
Other	7.3%

Study, the Coupon Scanning Program, and the DSD/UCS Study.

The Direct Product Profit (DPP) Study centers on the concept of calculating the net profit contribution of individual items sold in the store. Although the concept of DPP is not a new one, it has only recently become a cost-effective method for calculating profits. Due to technological advances which have made personal computers and electronic spread sheets widely available, DPP is now feasible for the grocery industry. The goal of the DPP Study is to create a unified methodology for DPP calculations which will allow companies to study the efficiencies of their system. The project will result in a standard methodology for DPP calculations and an extensive education program available to the entire food industry.

A study of coupon redemption practices was undertaken with the goal of remedying the problem that develops when manufacturers fail to provide retailers with reasons for coupon rejections. Without this information, retailers are unable to provide supporting evidence that the redemptions were legitimate or identify the source of any internal control problems. The objectives of the coupon redemption study are to develop an understanding of the magnitude of the problem; to help retailers understand the need for redemption monitoring procedures; and to suggest communication guidelines for the information which manufacturers should provide with coupon chargebacks.

In late 1984 UPC guidelines for scannable coupons were finalized. With more and more coupons now having bar codes on them, retailers are starting to look at scanning coupons. To help in this effort, a study has been initiated to assess the costs and benefits for retailers interested in using coupon scanning.

Another task force was created to take a fresh look at direct store delivery. The effort here is a two-pronged one. First, protocol will be established for applying the Uniform Communication System (UCS) to DSD. This application will permit electronic information exchange for DSD products. Second, the task force will reexamine total DSD system practices at the store level.

Almost all of these system improvements require accurate UPC information. Several projects are underway to improve the integrity of this system. For example, in 1985 a UPC File Maintenance Program will be developed that will assist companies in making better use of their UPC file space, and at the same time maintaining accurate UPC item files. Over the past few years, many retailers and wholesalers have found UPC item files nearing their physical capacity. To relieve the system overload, this program establishes a procedure by which the distributor sends the manufacturer information on UPC items in his files. The manufacturer matches the codes, identifies whether each product offering is still active, and returns the updated list to the distributor to implement the file changes.

Store Development

Store Activity

In 1984, 4.3 percent of all stores were opened, 4.1 percent were newly constructed, and almost seven percent were closed. Supermarkets got younger in 1984. Store opening and closing activity last year brought the average age of a supermarket, since its last major remodel, to 6.5 years. That's nearly two years younger than the 1983 average age of 8.4 years. Every type of store except the warehouse store fits this pattern. They went from three years in 1983 to 6.4 years in 1984.

Almost two-thirds of all stores were leased from another company. Another third were owned by the supermarket company itself. About five percent were leased from a subsidiary. For existing stores, minimum rent per square foot per year and overages stayed the same as a year ago, $3.31 and 0.9 percent respectively. Expected total rent was down.

New Stores

The total size of a typical new store was 39,800 square feet in 1984, up from 38,000 square feet in 1983, and required 12 months from ground breaking to break even. This figure has stayed the same over three years.

Almost half the stores opened in 1984 were super stores. About 70 percent of the stores closed were conventional stores. It's important to note that there's been a blending of store types occurring that has made it increasingly difficult to define the various store types precisely. Conventionals are getting larger, super stores are adding more general merchandise, and warehouse stores are adding specialty departments. Two different observers might well label the same store a "super" and a "combo" respectively — or even a large conventional. Even further blurring of the traditional categories is likely as the evolution in store formats suited to customers continues.

For new stores, minimum rent rose in 1984, but overages declined. The mean expected total rent was $5.90 per square foot per year, down from $6.09 in 1983. It was highest for combination stores, followed by warehouse stores, super stores, and conventionals.

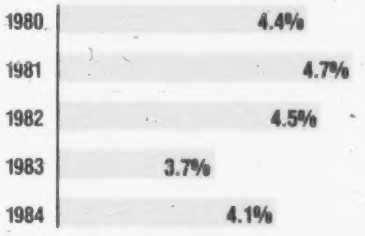
Closings

During 1984, 6.9 percent of all supermarkets closed. Supermarket owners reported that 70.7 percent of the stores that were closed were conventional stores. Almost 24 percent of the stores were super stores; 4.1 percent were combination stores; and less than one percent of the stores were either warehouse stores or limited assortment stores.

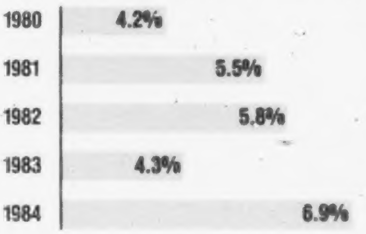
Remodeling

The typical supermarket that was remodeled in 1984 cost $500,000 for remodeling, compared to $400,000 a year earlier. As in 1983, companies again said that it was 10 years from their store's first opening to its present remodeling. And 1984 also saw no change in the number of years from the last major remodeling to the present remodeling for older stores. That number was still seven years.

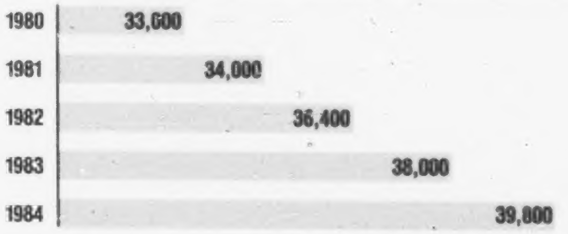
New Stores Opened



Stores Closed



New Store Total Area in Square Feet



Appendix

About the Study

This year's report is the result of food marketing companies participation in several FMI surveys, *Retail Operations, Distribution Center Operations, Operations Review,* and *Facts About Store Development.* Nonmembers as well as members were invited to provide company data in many of the surveys. The sample descriptions for five of these questionnaires are presented on the next page. These numbers represent information from approximately 18 percent of the companies invited to participate.

All averages shown in this report are median figures, except where noted. Medians provide a better industry average because the figures are not subject to distortion by unusual extremes. This is very important when a few companies differ very significantly from the marketing average.

When measuring real growth in retail sales and productivity, *Speaks* uses the CPI food-at-home index and its annual percentage increase as deflators. To deflate a dollar figure, the CPI food-at-home number is used. For example, to deflate 1984 "sales per square foot" (see page 9) divide the current dollar figure ($8.00) by the 1984 CPI food-at-home index number (292.6). Then multiply the total by 100 ($8.00 ÷ 292.6 × 100 = $2.73 "sales per square foot" in real or deflated dollars). On the other hand, to deflate a percentage, use the inverse of the CPI food-at-home percent change. To deflate 1984 "retail sales increase" (see page 7) add one to the 1984 current dollar percentage (1 + 0.073); multiply this by the inverse of the 1984 CPI food-at-home percent change plus one (1 ÷ 1.037). The deflated number is 3.5 percent. The table below charts these deflators.

In this report, FMI defines a supermarket as a retail food store with annual sales of at least $2 million. This report is a summary of key findings of the surveys. Some, however, may have the need for more detailed facts and figures. The supporting tables for this report are found in the companion reports entitled *Detailed Tabulations* from the *Food Marketing Industry Speaks, 1985* and in *Facts About Store Development.*

Index For Deflating Annual Supermarket Sales

	CPI Food at Home	**% Increase**
1974	**162.4**	**14.9**
1975	**175.8**	**8.3**
1976	**179.5**	**2.4**
1977	**190.2**	**6.0**
1978	**210.2**	**10.5**
1979	**232.9**	**10.8**
1980	**251.5**	**8.0**
1981	**269.9**	**7.3**
1982	**279.2**	**3.4**
1983	**282.2**	**1.1**
1984	**292.6**	**3.7**

Trends in Operating Results

	1980	**1981**	**1982**	**1983**	**1984**
Gross Profit with Warehouse	22.4%	23.0%	23.4%	23.7%	24.1%
Gross Profit Without Warehouse	20.9%	20.9%	21.2%	21.5%	21.6%
Sales Per Labor Hour	$87.27	$89.00	$90.00	$91.00	$90.85
Sales Per Square Foot	$ 6.94	$ 6.75	$ 7.90	$ 6.95	$ 8.00
Sale Per Customer Transaction	$12.10	$14.23	$14.33	$14.60	$15.36
Average Hourly Labor Cost*	$ 6.57	$ 7.64	$ 7.93	$ 8.12	$ 8.58
Store Labor Expense	8.4%	8.5%	8.8%	8.8%	8.9%
Fringe Benefit Expense	1.9%	2.0%	2.1%	2.2%	2.3%
Net Profit (before taxes)	1.5%	1.4%	1.5%	1.3%	1.6%

*Excluding fringe benefits

PACIFIC
MOUNTAIN
WEST NORTH CENTRAL
WEST SOUTH CENTRAL
EAST NORTH CENTRAL
SOUTH EAST
MIDDLE ATLANTIC
NORTH EAST

Sample Description For *Food Marketing Industry Speaks*

Retail Operations Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (283)
Under $10	30.7%
$10-$30	18.0%
$31-$100	20.5%
$101-$250	14.1%
$251-$500	7.4%
Over $500	9.2%
	100.0%

EFT Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (340)
Under $10	36.5%
$10-$30	18.2%
$31-$100	16.5%
$101-$250	9.7%
$251-$500	7.6%
Over $500	11.5%
	100.0%

Distribution Center Operations Questionnaire

(Base) Company Sales (millions)	Sample Wholesale Companies (31)	Sample Retail Companies (45)
Under $30	3.2%	—
$31-$100	19.4%	8.9%
$101-$250	32.3%	17.8%
$251-$500	16.1%	22.2%
Over $500	29.0%	51.1%
	100.0%	100.0%

Retail Fish and Seafood Operations Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (197)
Under $10	31.0%
$10-$30	16.8%
$31-$100	17.8%
$101-$250	11.7%
$251-$500	10.2%
Over $500	12.7%
	100.0%

Retail Meat Operations Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (232)
Under $10	30.6%
$10-$30	13.8%
$31-$100	21.1%
$101-$250	13.8%
$251-$500	8.2%
Over $500	12.5%
	100.0%

READER'S COMMENT FORM

Report: The Food Marketing Industry Speaks 1985

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5.2

Detailed Tabulations

The
FOOD
MARKETING
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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,500 members—food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate more than 17,000 retail food stores with a combined annual sales volume of $140 billion—half of all grocery sales in the United States. More than three-fourths of the FMI's membership is composed of independent supermarket operators or small regional firms. Its international membership includes more than 100 members from 40 nations.

Foreword

This publication is the companion report to The Food Marketing Industry Speaks, 1985. It contains the detailed tabulations for the information summarized in that report.

An annual survey of food wholesalers and retailers is the primary source of information for this report. Any data not taken from FMI's Speaks surveys are indicated by a footnote.

Data are for 1984. Company sales data are reported on an annual basis; productivity data, sales per labor hour, square foot or transaction, are reported on a weekly basis.

Except where noted, averages in these tables are mean figures; all others are medians. A median represents the halfway or middle figure when all figures are listed in order from the smallest to the largest. Medians are only presented when four or more companies in a category answered the question, except for distribution centers when it is three or more.

All Canadian dollar figures have been converted from Canadian dollars to United States dollars. This year's report is the first to convert Canadian currency into U.S. dollars.

In addition to presenting data for wholesale and retail operations, Speaks, 1985 also includes a section on dry grocery and frozen food distribution centers. Figures in this section are presented for both wholesalers and retailers, as well as for all companies.

Subject areas explored in depth this year are the meat department, seafood department and electronic funds transfer.

Data for store profiles are found in Tables 59A and 59B. In these tables sales and productivity figures are presented for five different types of grocery stores. For example, average sale per customer transaction is shown for conventional stores, super stores, combination stores and warehouse stores.

In order to insure the confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

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TABLE 1

GEOGRAPHIC REGION OF WHOLESALE HEADQUARTERS

	ALL WHOLESALE COMPANIES	1984 WHOLESALE SALES (MILLIONS OF DOLLARS)					WHOLESALE AFFILIATION		
		30 OR LESS	31-100	101-250	251-500	OVER 500	COOP-ERATIVE	VOLUN-TARY	UNAFFI-LIATED
ALL COMPANIES	31	1	6	10	5	9	20	8	3
NORTHEAST	3.2		-	10.0	-	-	-	12.5	
MIDDLE ATLANTIC	16.1		50.0	10.0	-	11.1	15.0	12.5	
EAST NORTH CENTRAL	25.8		-	40.0	20.0	33.3	25.0	25.0	
WEST NORTH CENTRAL	-		-	-	-	-	-	-	
SOUTHEAST	25.8		16.7	30.0	60.0	11.1	20.0	50.0	
WEST SOUTH CENTRAL	12.9		16.7	10.0	-	11.1	15.0	-	
MOUNTAIN	-		-	-	-	-	-	-	
PACIFIC	16.1		16.7	-	20.0	33.3	25.0	-	
CANADA	-		-	-	-	-	-	-	

TABLE 2

AVERAGE PERCENT CHANGE IN WHOLESALE SALES 1983 VS 1984

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	6.8	1.4	12.6	27
REGION				
NORTHEAST				1
MIDDLE ATLANTIC				3
EAST NORTH CENTRAL	5.6	-3.2	10.0	7
WEST NORTH CENTRAL				0
SOUTHEAST	7.1	6.0	12.6	7
WEST SOUTH CENTRAL	9.3	1.6	27.7	4
MOUNTAIN				0
PACIFIC	3.7	.3	5.7	5
CANADA				0
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100	6.8	-3.2	10.5	5
101-250	6.6	.7	16.3	8
OVER 250	5.7	3.7	11.2	13
NUMBER OF SUPERMARKETS SERVED				
1-10				3
11-50	-1.6	-5.1	3.0	4
51-100				2
OVER 100	7.1	5.4	11.2	17
WHOLESALE AFFILIATION				
COOPERATIVE	6.0	.3	10.5	17
VOLUNTARY	7.4	3.4	18.2	8
UNAFFILIATED				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 3

PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO -- SUMMARY TABLE OF MEANS

	ALL WHOLESALE COMPANIES	1984 WHOLESALE SALES (MILLIONS OF DOLLARS) 30 OR LESS	31-100	101-250	251-500	OVER 500
INDEPENDENT FOOD STORES	84.4	25.0	54.3	80.3	44.1	93.6
CORPORATELY OWNED STORES	7.1	0	9.9	9.8	37.7	1.2
OTHER FOOD CHAINS	3.9	0	0	4.7	7.7	3.2
CONVENIENCE STORES	2.8	75.0	19.3	4.4	.7	2.0
HOSPITALS	.1	0	.2	0	1.1	0
RESTAURANTS	0	0	.2	0	0	0
SCHOOLS	0	0	.2	0	0	0
OTHER	1.6	0	15.7	.9	8.7	0

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 4

AVERAGE SALES PER RETAIL STORE SERVED -- IN MILLIONS OF DOLLARS

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	2.21	1.29	3.88	29
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				0
31-100	4.75	1.96	10.50	6
101-250	2.17	1.29	5.65	10
OVER 250	1.63	1.19	2.56	13
WHOLESALE AFFILIATION				
COOPERATIVE	2.13	1.29	3.88	19
VOLUNTARY	1.92	1.00	3.87	8
UNAFFILIATED				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

WHOLESALE OPERATIONS

TABLE 5

SERVICES PROVIDED TO MEMBERSHIP **

	ALL WHOLESALE COMPANIES	1984 WHOLESALE SALES (MILLIONS OF DOLLARS)				
		30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	31	1	6	10	5	9
ADVERTISING PROGRAM	96.8		100.0	100.0	100.0	100.0
INDIVIDUAL RETAIL PRICING	96.8		83.3	100.0	100.0	100.0
PRODUCT MOVEMENT DATA	96.8		83.3	100.0	100.0	100.0
HANDLE GENERIC LABEL	96.8		100.0	100.0	100.0	88.9
EQUIPMENT PROCUREMENT	93.5		83.3	90.0	100.0	100.0
HANDLE PRIVATE LABEL	93.5		66.7	100.0	100.0	100.0
GROSS MARGIN REPORT BY ITEM	90.3		100.0	80.0	100.0	88.9
REAL ESTATE & STORE ENGINEERING	80.6		33.3	80.0	100.0	100.0
RETAIL ACCOUNTING	74.2		50.0	60.0	100.0	88.9
INTERIOR DECOR & DESIGN	74.2		16.7	70.0	100.0	100.0
DISCOUNT PROGRAMS	74.2		50.0	60.0	100.0	88.9
EDUCATION/TRAINING	67.7		16.7	50.0	100.0	100.0
MEMBER PAYROLL	67.7		50.0	80.0	80.0	66.7
SCANNING SUPPORT	64.5		-	60.0	100.0	100.0
EQUIPMENT & FIXTURE FINANCING	58.1		16.7	60.0	80.0	77.8
DSD SYSTEM	58.1		50.0	40.0	100.0	66.7
LEASE FINANCING	54.8		-	50.0	100.0	77.8
SPACE ALLOCATION	51.6		33.3	40.0	100.0	55.6
OTHER	3.2		-	-	-	11.1

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

DISTRIBUTION CENTER OPERATIONS

TABLE 6

PROFILE OF COMPANIES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL COMPANIES	76	7	14	18	3	16	10	1	7	0
RETAILERS	59.2	85.7	64.3	55.6		50.0	60.0		28.6	
COOPERATIVE WHOLESALERS	26.3	-	21.4	27.8		25.0	30.0		71.4	
VOLUNTARY WHOLESALERS	10.5	14.3	7.1	11.1		25.0	-		-	
UNAFFILIATED WHOLESALERS	3.9	-	7.1	5.6		-	10.0		-	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 7

PERCENTAGE OF COMPANIES USING MICROCOMPUTERS IN DISTRIBUTION CENTERS

	ALL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1984 SALES (MILLIONS OF DOLLARS) 30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	74	45	29	1	9	17	15	32
USE MICROCOMPUTERS	58.1	48.9	72.4		33.3	52.9	53.3	68.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 8

USE OF MICROCOMPUTERS IN WAREHOUSES **

	ALL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1984 SALES (MILLIONS OF DOLLARS) 30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	42	21	21	1	3	9	7	22
SPREAD SHEET ANALYSIS	61.9	66.7	57.1			55.6	42.9	72.7
WORD PROCESSING	52.4	42.9	61.9			44.4	71.4	54.5
PRODUCTIVITY CONTROL	52.4	47.6	57.1			66.7	57.1	45.5
LABOR STANDARDS	38.1	28.6	47.6			33.3	42.9	36.4
INVENTORY CONTROL	33.3	28.6	38.1			33.3	28.6	36.4
PAYROLL	28.6	28.6	28.6			22.2	28.6	31.8
LABOR SCHEDULING	28.6	23.8	33.3			11.1	57.1	31.8
CONTROL WAREHOUSE MECHANISM	26.2	23.8	28.6			22.2	28.6	31.8
ORDER PROCESSING	23.8	14.3	33.3			44.4	28.6	9.1
ENERGY MANAGEMENT	23.8	23.8	23.8			22.2	42.9	22.7
AS SMART TERMINALS	19.0	19.0	19.0			11.1	28.6	22.7
ORDER ENTRY FROM STORE	19.0	4.8	33.3			55.6	14.3	4.5
SHELF LABELS/TALKERS	16.7	4.8	28.6			33.3	-	13.6
PROGRAM DEVELOPMENT	16.7	19.0	14.3			22.2	14.3	13.6
SPACE MANAGEMENT	11.9	9.5	14.3			-	28.6	13.6
OTHER	9.5	14.3	4.8			-	14.3	13.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 9

PERCENTAGE OF COMPANIES WITH MAJORITY OF MICROCOMPUTERS OPERATING IN A NETWORK

	ALL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1984 SALES (MILLIONS OF DOLLARS) 30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	37	19	18	1	3	8	6	19
OPERATE IN NETWORK	21.6	21.1	22.2			37.5	50.0	10.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 10

PERCENTAGE OF COMPANIES OFFERING INCENTIVES ASSOCIATED WITH WORK PRODUCTIVITY

	ALL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1984 SALES (MILLIONS OF DOLLARS) 30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	74	45	29	1	9	8	14	32
OFFER INCENTIVES FOR:								
SALARIED WAREHOUSE EMPLOYEES	25.7	22.2	31.0		-	22.2	28.6	31.3
NON-SALARIED WAREHOUSE EMPLOYEES	32.4	33.3	31.0		-	27.8	28.6	43.8
TRUCK DRIVERS	21.6	20.0	24.1		-	22.2	28.6	21.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 11

INCENTIVE PROGRAMS AVAILABLE TO DISTRIBUTION CENTER EMPLOYEES **

	RETAIL COMPANIES				WHOLESALE COMPANIES			
	TOTAL	SALARIED EMPLOYEES	NON-SALARIED EMPLOYEES	DRIVERS	TOTAL	SALARIED EMPLOYEES	NON-SALARIED EMPLOYEES	DRIVERS
TOTAL	30	9	13	8	25	9	9	7
TIME OFF WITH PAY	30.0	11.1	53.8	12.5	24.0	11.1	33.3	28.6
GIFT AWARDS	30.0	22.2	23.1	50.0	44.0	22.2	55.6	57.1
SPECIAL PURPOSE CASH AWARDS	20.0	11.1	15.4	37.5	44.0	33.3	44.4	57.1
YEAR END BONUSES	23.3	77.8	-	-	44.0	77.8	22.2	28.6
CONTEST AWARDS	26.7	33.3	15.4	37.5	32.0	22.2	33.3	42.9
ANNUAL MERIT INCREASES	33.3	66.7	15.4	25.0	20.0	33.3	11.1	14.3
ANNUAL PERFORMANCE REVIEWS	53.3	88.9	30.8	50.0	48.0	66.7	33.3	42.9
PUBLIC RECOGNITION AWARDS	16.7	11.1	7.7	37.5	20.0	22.2	11.1	28.6
OTHER	6.7	-	15.4	-	8.0	-	22.2	-

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 12

TYPICAL PERCENTAGE OF ANNUAL DISTRIBUTION CENTER COMPENSATION EXPENSE ALLOTED TO INCENTIVE PROGRAMS

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	2.0	1.0	10.0	18

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

DISTRIBUTION CENTER OPERATIONS

TABLE 13

PERCENTAGE OF TOTAL DISTRIBUTION CENTER INCENTIVES CASH VS. NON-CASH

				1984 SALES (MILLIONS OF DOLLARS)				
	ALL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	22	14	8	1	0	7	1	13
CASH	88.9	86.5	93.1			92.1		90.1
NON-CASH	11.1	13.5	6.9			7.9		9.9

DRY GROCERY DISTRIBUTION OPERATIONS

TABLE 14

AVERAGE TOTAL AREA IN SQUARE FEET OF THE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	271,000	165,000	400,000	95
RETAIL CENTERS	260,700	180,000	356,000	57
WHOLESALE CENTERS	288,000	155,000	404,000	38

TABLE 15

AVERAGE NUMBER OF EMPLOYEES IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	107	59	155	95
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	21	12	45	8
100,000-199,999	66	37	94	26
200,000-299,999	95	59	119	19
300,000-399,999	130	111	155	18
400,000 OR MORE	220	146	288	24

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 16

AVERAGE NUMBER OF SUPERMARKETS SERVED PER DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	75	43	148	93
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	21	4	61	7
100,000-199,999	45	25	75	26
200,000-299,999	61	57	86	19
300,000-399,999	106	55	135	17
400,000 OR MORE	164	131	428	24

TABLE 17

TYPE OF SELECTION METHOD IN DRY GROCERY DISTRIBUTION CENTER/SECTION

		SIZE OF DRY GROCERY DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
	ALL CENTERS	LESS THAN 100,000	100,000 TO 199,999	200,000 TO 299,999	300,000 TO 399,999	400,000 OR MORE
ALL CENTERS	84	7	24	18	14	21
MANUAL SELECTION	84.5	100.0	100.0	83.3	71.4	71.4
SELECT TO CONVEYOR	15.5	-	-	16.7	28.6	28.6
AUTOMATED SELECTION	-	-	-	-	-	-

TABLE 18

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	198,884	100,000	330,500	94
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	18,600	15,300	49,000	7
100,000-199,999	85,000	70,000	135,000	26
200,000-299,999	190,000	125,000	232,619	19
300,000-399,999	260,531	210,000	362,372	18
400,000 OR MORE	395,150	340,250	632,000	24

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 19

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	187	113	708	79
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	75	68	163	5
100,000-199,999	139	100	350	19
200,000-299,999	173	102	562	15
300,000-399,999	415	126	1005	18
400,000 OR MORE	406	136	711	22

TABLE 20

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	66	57	85	80
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	60	57	100	5
100,000-199,999	64	51	85	18
200,000-299,999	64	59	76	18
300,000-399,999	71	64	88	17
400,000 OR MORE	68	59	82	22

TABLE 21

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	175	143	225	91
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	188	133	280	6
100,000-199,999	164	132	198	26
200,000-299,999	169	124	204	18
300,000-399,999	200	149	252	18
400,000 OR MORE	187	158	340	23

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 22

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	380	265	580	65
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000				2
100,000-199,999	350	265	540	15
200,000-299,999	340	228	608	14
300,000-399,999	455	326	765	15
400,000 OR MORE	366	225	550	19

TABLE 23

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	190	100	300	91
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	34	12	68	7
100,000-199,999	100	71	133	24
200,000-299,999	198	150	260	19
300,000-399,999	235	185	300	18
400,000 OR MORE	375	300	600	23

TABLE 24

AVERAGE NUMBER OF INBOUND RAIL CARS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	6.0	2.0	18.0	66
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000				2
100,000-199,999	3.0	2.0	15.0	18
200,000-299,999	4.5	1.0	8.0	14
300,000-399,999	5.0	3.0	20.0	13
400,000 OR MORE	15.0	8.0	30.0	19

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 25

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	196.5	107.5	317.5	92
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	35.0	21.5	102.0	8
100,000-199,999	95.5	66.5	120.0	24
200,000-299,999	176.0	150.0	230.0	19
300,000-399,999	275.0	214.0	330.0	18
400,000 OR MORE	431.0	300.0	575.0	23

TABLE 26A

AVERAGE NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION ALL CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	5822	4500	7311	92
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	1150	1000	4800	7
100,000-199,999	6000	4100	7150	26
200,000-299,999	5600	4000	7421	19
300,000-399,999	5900	5200	6231	17
400,000 OR MORE	6600	5050	8000	23

TABLE 26B

AVERAGE NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION WHOLESALE CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	6755	5950	8000	36
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000				2
100,000-199,999	6000	4500	8010	13
200,000-299,999	7750	7000	9000	4
300,000-399,999	6482	6000	7500	7
400,000 OR MORE	8000	6700	8200	10

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 26C

AVERAGE NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION RETAIL CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	5216	4115	6000	56
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	1050	1000	1150	5
100,000-199,999	4919	4000	6300	13
200,000-299,999	5250	4000	5844	15
300,000-399,999	5210	4500	5800	10
400,000 OR MORE	5699	5017	6100	13

TABLE 27

AVERAGE NUMBER OF INVENTORY TURNS IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	15	14	18	86
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	15	8	18	7
100,000-199,999	16	13	18	23
200,000-299,999	14	14	15	17
300,000-399,999	16	14	20	17
400,000 OR MORE	17	14	24	22

TABLE 28

CURRENT SCRATCH RATE IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	3.5	1.0	5.0	81
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	5.0	2.0	5.1	5
100,000-199,999	3.5	.4	4.7	23
200,000-299,999	4.5	1.4	5.4	17
300,000-399,999	3.5	1.2	6.5	15
400,000 OR MORE	1.5	.5	4.0	21

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 29A

AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK IN WHOLESALE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	500	330	683	35
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100	400	164	455	6
101-250	329	220	520	9
OVER 250	575	480	900	19

TABLE 29B

AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	208	128	300	56
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				0
10-30				0
31-100	63	27	121	4
101-250	86	45	129	7
251-500	196	155	205	9
OVER 500	261	203	430	36

TABLE 29C

AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	208	126	277	47
MANUAL SELECTION	203	117	261	41
SELECT TO CONVEYOR	237	208	900	6
AUTOMATED SELECTION				0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 30

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	95	57	38
SHIFTS PER DAY			
LESS THAN ONE	-	-	-
ONE UP TO TWO	17.9	24.6	7.9
TWO UP TO THREE	52.6	47.4	60.5
THREE UP TO FOUR	29.5	28.1	31.6
FOUR OR MORE	-	-	-
ALL CENTERS	92	57	35
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	47.8	47.4	48.6
SIX UP TO SEVEN	39.1	40.4	37.1
SEVEN	13.0	12.3	14.3
ALL CENTERS	92	57	35
EMPLOYEES UNIONIZED			
YES	70.7	64.9	80.0
NO	29.3	35.1	20.0

TABLE 31

AVERAGE NUMBER OF CASES RECEIVED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	429	264	898	78
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 100,000	373	199	523	4
100,000-199,999	290	222	498	18
200,000-299,999	321	260	589	17
300,000-399,999	491	279	854	18
400,000 OR MORE	950	567	1360	21

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 32

AVERAGE TOTAL AREA IN SQUARE FEET OF THE FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	38,256	20,125	52,250	60
RETAIL CENTERS	39,311	20,250	60,000	35
WHOLESALE CENTERS	30,000	20,000	50,000	25

TABLE 33

AVERAGE NUMBER OF EMPLOYEES IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	18	9	30	60
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	6	5	8	9
20,000 - 39,999	11	9	19	20
40,000 - 79,999	24	18	41	20
80,000 OR MORE	37	24	44	8

TABLE 34

AVERAGE NUMBER OF SUPERMARKETS SERVED PER FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	81	54	151	60
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	42	19	86	9
20,000 - 39,999	74	56	126	20
40,000 - 79,999	89	51	151	20
80,000 OR MORE	255	131	489	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 35

TYPE OF SELECTION METHOD IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

		SIZE OF FROZEN FOOD DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
	ALL CENTERS	LESS THAN 10,000	10,000 TO 19,999	20,000 TO 39,999	40,000 TO 79,999	80,000 OR MORE
ALL CENTERS	53	3	8	19	18	5
MANUAL SELECTION	84.9		[illegible]	89.5	77.8	80.0
SELECT TO CONVEYOR	13.2		12.5	10.5	16.7	20.0
AUTOMATED SELECTION	1.9		-	-	5.6	-

TABLE 36

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	50,400	21,200	82,000	59
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	15,456	9,450	22,900	8
20,000 - 39,999	42,150	19,100	51,700	20
40,000 - 79,999	74,480	48,750	96,300	20
80,000 OR MORE	96,500	80,200	137,000	8

TABLE 37

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	182	113	671	48
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				2
10,000 - 19,999	135	95	378	6
20,000 - 39,999	147	92	657	14
40,000 - 79,999	307	145	749	20
80,000 OR MORE	312	128	987	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 38

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	80	66	95	44
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				2
10,000 - 19,999	76	37	82	5
20,000 - 39,999	75	58	86	11
40,000 - 79,999	73	66	96	19
80,000 OR MORE	95	89	100	7

TABLE 39

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	180	140	220	57
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	133	83	169	8
20,000 - 39,999	172	140	190	18
40,000 - 79,999	197	165	225	20
80,000 OR MORE	250	164	310	8

TABLE 40

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	360	218	575	41
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				1
10,000 - 19,999	161	121	188	4
20,000 - 39,999	360	229	616	15
40,000 - 79,999	432	220	597	16
80,000 OR MORE	395	390	515	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 41

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	38	20	75	57
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	20	12	26	9
20,000 - 39,999	26	20	40	18
40,000 - 79,999	45	35	80	19
80,000 OR MORE	96	83	115	8

TABLE 42

AVERAGE NUMBER OF INBOUND RAIL CARS PER WEEK -- FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1.0	1.0	2.0	8

TABLE 43

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK -- FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	45.0	26.0	90.0	49
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	15.0	12.0	24.0	9
20,000 - 39,999	40.0	28.5	80.0	12
40,000 - 79,999	47.0	39.0	90.0	18
80,000 OR MORE	130.0	75.0	277.0	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 44A

AVERAGE NUMBER OF ITEMS AVAILABLE IN FROZEN FOOD DISTRIBUTION CENTER/SECTION ALL CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1000	800	1300	57
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	900	773	1017	9
20,000 - 39,999	907	800	1200	18
40,000 - 79,999	1019	916	1265	19
80,000 OR MORE	1450	1055	1699	8

TABLE 44B

AVERAGE NUMBER OF ITEMS AVAILABLE IN FROZEN FOOD DISTRIBUTION CENTER/SECTION WHOLESALE CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1091	800	1440	23
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				1
10,000 - 19,999	900	899	1000	5
20,000 - 39,999	1300	800	1450	7
40,000 - 79,999	1400	725	1440	5
80,000 OR MORE	1400	1100	1698	5

TABLE 44C

AVERAGE NUMBER OF ITEMS AVAILABLE IN FROZEN FOOD DISTRIBUTION CENTER/SECTION RETAIL CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	998	800	1200	34

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 45

AVERAGE NUMBER OF INVENTORY TURNS IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	18	13	22	54
SIZE OF DISTRIBUTION CENTER/SECTION (SQUARE FEET)				
LESS THAN 10,000				3
10,000 - 19,999	10	8	20	7
20,000 - 39,999	15	13	20	17
40,000 - 79,999	18	13	24	19
80,000 OR MORE	21	18	26	8

TABLE 46

CURRENT SCRATCH RATE IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	3.4	1.0	5.0	50
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000 - 19,999	4.4	2.8	5.0	8
20,000 - 39,999	2.7	.7	4.0	17
40,000 - 79,999	4.1	1.0	5.0	16
80,000 OR MORE	2.8	1.2	4.0	6

TABLE 47A

AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK IN WHOLESALE FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	463	250	554	22

TABLE 47B

AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	169	140	293	34

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 47C

AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK IN RETAIL FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	168	140	266	29
MANUAL SELECTION	168	140	293	23
SELECT TO CONVEYOR	160	123	171	5
AUTOMATED SELECTION				1

TABLE 48

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	59	35	24
SHIFTS PER DAY			
LESS THAN ONE	-	-	-
ONE UP TO TWO	28.8	40.0	12.5
TWO UP TO THREE	57.6	48.6	70.8
THREE UP TO FOUR	13.6	11.4	16.7
FOUR OR MORE	-	-	-
ALL CENTERS	56	32	24
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	5.4	9.4	-
FIVE UP TO SIX	51.8	50.0	54.2
SIX UP TO SEVEN	28.6	28.1	29.2
SEVEN	14.3	12.5	16.7
ALL CENTERS	56	35	21
EMPLOYEES UNIONIZED			
YES	73.2	68.6	81.0
NO	26.8	31.4	19.0

TABLE 49

AVERAGE NUMBER OF CASES RECEIVED PER DIRECT LABOR HOUR IN FROZEN FOOD DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	394	267	695	51
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000 - 19,999	225	39	300	6
20,000 - 39,999	321	249	522	16
40,000 - 79,999	695	350	1211	19
80,000 OR MORE	505	494	627	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 50

GEOGRAPHIC REGION OF RETAILERS HEADQUARTERS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	283	98	184	87	51	58	40	21	26
NORTHEAST	8.8	8.2	9.2	9.2	13.7	5.2	5.0	9.5	11.5
MIDDLE ATLANTIC	14.1	17.3	12.5	9.2	13.7	15.5	17.5	19.0	19.2
EAST NORTH CENTRAL	21.6	20.4	22.3	17.2	25.5	24.1	25.0	19.0	19.2
WEST NORTH CENTRAL	8.6	6.1	10.3	13.8	3.9	10.3	5.0	4.8	7.7
SOUTHEAST	18.7	18.4	18.5	19.5	13.7	24.1	20.0	4.8	23.1
WEST SOUTH CENTRAL	6.4	8.2	5.4	5.7	9.8	1.7	7.5	9.5	7.7
MOUNTAIN	6.0	5.1	6.5	8.0	7.8	-	7.6	9.5	3.8
PACIFIC	13.1	11.2	14.1	17.2	7.8	19.0	12.5	9.5	-
CANADA	2.5	5.1	1.1	-	3.9	-	-	14.3	7.7

TABLE 51

AVERAGE PERCENTAGE OF OPERATIONS SUPPLIED BY OUTSIDE WHOLESALERS AND DIRECT VENDOR DELIVERIES

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	100	50	100	275
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	100	100	100	85
10 - 30 MILLION	100	95	100	51
31 - 100 MILLION	100	85	100	55
101 - 250 MILLION	81	35	100	39
251 - 500 MILLION	39	20	55	21
OVER 500 MILLION	25	16	33	24
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	100	53	100	24
MIDDLE ATLANTIC	95	42	100	40
EAST NORTH CENTRAL	100	40	100	58
WEST NORTH CENTRAL	100	40	100	25
SOUTHEAST	100	36	100	53
WEST SOUTH CENTRAL	100	100	100	16
MOUNTAIN	100	68	100	16
PACIFIC	100	95	100	36
CANADA	45	26	100	7
RETAIL AFFILIATION				
CHAIN	50	25	100	93
INDEPENDENT	100	98	100	181

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 52

NUMBER OF SUPERMARKETS COMPANY OPERATES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	283	25	40	61	25	53	18	17	37	7
1	27.9	24.0	27.5	24.6	32.0	30.2	27.8	35.3	32.4	-
2-10	37.1	44.0	30.0	42.6	44.0	34.0	27.8	35.3	37.8	28.6
11-49	23.7	24.0	25.0	24.6	16.0	22.6	27.8	17.6	27.0	28.6
50 AND OVER	11.3	8.0	17.5	6.2	8.0	13.2	16.7	11.8	2.7	42.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 53A

PERCENTAGE OF OPERATION SUPPLIED BY

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	275	24	40	58	25	53	16	16	36	7
OWN WAREHOUSE	65.3	70.1	64.6	67.4	50.3	72.4	55.3	50.6	34.9	69.1
DIRECT VENDOR DELIVERIES	24.8	15.5	23.5	26.5	27.0	24.0	23.2	27.7	23.3	28.7
VOLUNTARY WHOLESALER	3.8	5.9	1.9	2.2	13.8	1.5	11.1	13.8	7.5	.2
COOPERATIVE WHOLESALER	3.6	7.2	4.6	2.0	3.1	1.7	1.5	6.5	25.2	.3
UNAFFILIATED WHOLESALER	2.1	.9	4.0	1.7	5.4	.4	8.6	.3	6.4	1.7

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 53B

PERCENTAGE OF OPERATION SUPPLIED BY

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	275	93	181	85	51	55	39	21	24
OWN WAREHOUSE	65.3	67.0	16.3	4.6	7.1	13.8	29.2	59.3	73.9
DIRECT VENDOR DELIVERIES	24.8	24.2	25.2	28.2	31.6	24.7	28.5	25.7	24.1
VOLUNTARY WHOLESALER	3.8	3.3	23.0	32.9	35.2	23.5	11.9	2.8	1.3
COOPERATIVE WHOLESALER	3.6	3.1	22.0	25.9	13.2	21.9	19.6	7.2	.2
UNAFFILIATED WHOLESALER	2.1	2.0	9.7	5.9	10.8	12.3	7.0	5.0	.5

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 54

RETAIL SALES IN 1984

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	283	25	40	61	25	53	18	17	37	7
UNDER 10 MILLION	30.7	32.0	20.0	24.6	48.0	32.1	27.8	41.2	40.5	-
10 - 30 MILLION	18.0	28.0	17.5	21.3	8.0	13.2	27.8	23.5	10.8	28.6
31 - 100 MILLION	20.5	12.0	22.5	23.0	24.0	26.4	5.6	-	29.7	-
101 - 250 MILLION	14.1	8.0	17.5	16.4	8.0	15.1	16.7	17.6	13.5	-
251 - 500 MILLION	7.4	8.0	10.0	6.6	4.0	1.9	11.1	11.8	5.4	42.9
OVER 500 MILLION	9.2	12.0	12.5	8.2	8.0	11.3	11.1	5.9	-	28.6

TABLE 55

TYPICAL PERCENT CHANGE IN RETAIL SALES 1983 VS. 1984

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	7.3	1.6	13.2	274
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	6.7	.0	12.5	83
10 - 30 MILLION	8.3	4.4	15.0	49
31 - 100 MILLION	7.7	2.2	12.5	58
101 - 250 MILLION	11.1	2.6	16.5	39
251 - 500 MILLION	4.1	.7	7.6	20
OVER 500 MILLION	7.4	4.1	13.2	25
REGION - CHAIN STORES				
NORTHEAST	9.2	1.0	13.2	7
MIDDLE ATLANTIC	4.0	1.6	7.3	17
EAST NORTH CENTRAL	7.3	1.6	11.1	19
WEST NORTH CENTRAL	8.2	4.8	19.3	6
SOUTHEAST	14.8	7.3	24.1	18
WEST SOUTH CENTRAL	13.4	7.2	20.8	8
MOUNTAIN	9.6	1.3	14.6	5
PACIFIC	4.1	.0	11.1	11
CANADA	4.0	.3	6.4	5
REGION - INDEPENDENT STORES				
NORTHEAST	8.6	4.3	11.8	17
MIDDLE ATLANTIC	8.3	3.3	19.0	23
EAST NORTH CENTRAL	5.7	-2.0	11.1	39
WEST NORTH CENTRAL	4.5	.0	8.9	18
SOUTHEAST	6.9	.4	12.6	32
WEST SOUTH CENTRAL	5.9	1.8	10.8	9
MOUNTAIN	12.0	6.3	17.5	12
PACIFIC	8.6	3.6	13.5	26
CANADA				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 56

TYPICAL PERCENT CHANGE IN RETAIL SALES IDENTICAL STORES 1983 VS. 1984

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	5.6	.9	10.4	231
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5.2	.0	12.5	72
10 - 30 MILLION	7.0	1.8	12.7	41
31 - 100 MILLION	5.6	2.3	9.2	45
101 - 250 MILLION	6.8	3.3	11.1	33
251 - 500 MILLION	3.1	.0	7.0	18
OVER 500 MILLION	4.9	2.3	8.5	22
REGION - CHAIN STORES				
NORTHEAST	5.6	.2	8.6	6
MIDDLE ATLANTIC	3.3	.8	8.2	16
EAST NORTH CENTRAL	6.3	3.3	8.0	17
WEST NORTH CENTRAL	5.8	.9	19.3	6
SOUTHEAST	4.7	4.2	6.8	13
WEST SOUTH CENTRAL	8.5	4.2	14.0	7
MOUNTAIN	9.6	2.7	11.3	5
PACIFIC	5.0	3.5	10.5	7
CANADA	5.0	.3	7.8	5
REGION - INDEPENDENT STORES				
NORTHEAST	8.9	4.4	15.9	16
MIDDLE ATLANTIC	6.5	1.5	9.1	17
EAST NORTH CENTRAL	5.0	-1.2	9.9	32
WEST NORTH CENTRAL	5.1	.6	8.9	14
SOUTHEAST	4.3	.0	9.9	29
WEST SOUTH CENTRAL	2.4	.0	10.8	9
MOUNTAIN	12.0	.0	15.0	10
PACIFIC	5.2	1.0	11.6	20
CANADA				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 57

TYPICAL WEEKLY SALES PER SUPERMARKET IN 1984

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	175,900	124,678	207,000	7068
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	74,300	51,500	85,000	102
10 - 30 MILLION	108,519	76,150	166,000	137
31 - 100 MILLION	126,900	85,168	161,132	430
101 - 250 MILLION	121,150	92,000	164,836	863
251 - 500 MILLION	150,470	96,828	192,300	871
OVER 500 MILLION	199,084	139,370	218,844	4665
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	233,787	189,594	260,486	340
MIDDLE ATLANTIC	150,470	124,678	250,000	1218
EAST NORTH CENTRAL	199,000	174,605	199,084	1888
WEST NORTH CENTRAL	168,024	167,000	237,208	307
SOUTHEAST	110,000	108,465	218,844	1326
WEST SOUTH CENTRAL	232,793	100,000	232,795	379
MOUNTAIN	207,100	207,000	207,150	597
PACIFIC	150,000	121,150	155,000	325
CANADA	139,370	137,753	140,000	688
RETAIL AFFILIATION				
CHAIN	190,533	124,700	207,136	6534
INDEPENDENT	120,000	82,000	192,308	534

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 58

TRENDS IN SALES DISTRIBUTION

	PERCENT OF STORE SALES IN:		
	Grocery	Meat	Produce
1976	67.9%	21.0%	7.0%
1977	68.0	20.2	7.0
1978	66.9	20.6	7.1
1979	70.5	22.1	6.9
1980	71.0	21.5	7.2
1981	70.9	21.3	7.6
1982	71.8	20.7	7.4
1983	72.0	20.2	7.9
1984	72.3	19.7	8.0

Source: Operations Review 1976-1984

TABLE 59A

PROFILE BY STORE TYPE --NUMBER OF STORES RESPONDING TO EACH ITEM

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
AVERAGE WEEKLY SALES	3651	1479	624	218
AVERAGE WEEKLY SALES/CHECKOUT	2934	667	226	169
AVERAGE SALE/ CUSTOMER TRANSACTION	3219	1440	597	222
SALES/LABOR HOUR	3204	674	207	179
AVERAGE WEEKLY SALES/SQUARE FOOT OF SELLING AREA	3292	1362	620	187
AVERAGE TOTAL SIZE/SQUARE FEET	4630	2330	614	223
AVERAGE RETAIL PRICE/ITEM	1496	406	166	119
AVERAGE NUMBER OF ITEMS CARRIED	2744	607	255	197

TABLE 59B

PROFILE BY STORE TYPE --MEDIANS

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
AVERAGE WEEKLY SALES	103,189	231,651	301,669	210,000
AVERAGE WEEKLY SALES/CHECKOUT	17,080	24,560	26,443	25,000
AVERAGE SALE/ CUSTOMER TRANSACTION	13.10	17.73	19.05	21.92
SALES/LABOR HOUR	84.38	86.22	88.50	128.63
AVERAGE WEEKLY SALES/SQUARE FOOT OF SELLING AREA	7.74	8.83	9.75	9.10
AVERAGE TOTAL SIZE/SQUARE FEET	18125	36000	48409	31750
AVERAGE RETAIL PRICE/ITEM	1.23	1.24	1.36	1.18
AVERAGE NUMBER OF ITEMS CARRIED	12,500	16,375	23,000	12,250

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 60

TYPICAL WEEKLY SALES PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	8.00	6.57	8.85	6416
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	7.23	5.39	9.62	104
10 - 30 MILLION	7.10	5.76	10.05	119
31 - 100 MILLION	8.05	5.67	11.77	377
101 - 250 MILLION	6.88	5.76	9.91	643
251 - 500 MILLION	6.98	5.81	9.10	799
OVER 500 MILLION	8.14	7.00	8.80	4374
REGION - CHAIN STORES				
NORTHEAST	12.43	9.62	12.45	233
MIDDLE ATLANTIC	8.02	8.00	11.36	950
EAST NORTH CENTRAL	8.14	8.10	8.20	1648
WEST NORTH CENTRAL	10.83	6.60	11.58	268
SOUTHEAST	7.00	5.00	7.05	1121
WEST SOUTH CENTRAL	9.60	6.55	9.62	331
MOUNTAIN	8.85	8.80	8.90	549
PACIFIC	5.76	4.68	6.12	168
CANADA	5.97	5.90	6.57	682
REGION - INDEPENDENT STORES				
NORTHEAST	10.73	9.00	11.61	34
MIDDLE ATLANTIC	8.96	6.85	11.15	46
EAST NORTH CENTRAL	8.00	5.84	12.10	140
WEST NORTH CENTRAL	9.87	7.23	12.02	32
SOUTHEAST	7.68	6.61	10.17	99
WEST SOUTH CENTRAL	5.00	4.87	5.75	19
MOUNTAIN	7.54	5.99	10.32	28
PACIFIC	11.41	9.50	14.50	62
CANADA	4.22	1.51	6.94	6

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 61

TYPICAL SALE PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	15.36	13.80	16.44	6697
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	12.00	9.86	14.00	104
10 - 30 MILLION	13.95	12.20	15.70	133
31 - 100 MILLION	14.02	11.40	17.16	423
101 - 250 MILLION	15.00	11.41	16.81	829
251 - 500 MILLION	14.02	11.46	19.58	851
OVER 500 MILLION	15.84	15.00	16.40	4357
REGION - CHAIN STORES				
NORTHEAST	19.30	18.01	19.58	302
MIDDLE ATLANTIC	15.09	13.60	18.00	1159
EAST NORTH CENTRAL	16.40	16.40	16.57	1728
WEST NORTH CENTRAL	13.80	13.75	18.46	268
SOUTHEAST	15.06	15.00	16.51	910
WEST SOUTH CENTRAL	12.93	12.93	14.02	304
MOUNTAIN	15.00	14.97	15.10	549
PACIFIC	12.50	11.46	15.00	277
CANADA	15.40	14.17	15.40	682
REGION - INDEPENDENT STORES				
NORTHEAST	18.00	13.78	18.40	33
MIDDLE ATLANTIC	16.68	14.73	19.96	44
EAST NORTH CENTRAL	15.00	12.31	17.12	159
WEST NORTH CENTRAL	13.89	10.53	16.06	45
SOUTHEAST	13.59	11.95	16.14	115
WEST SOUTH CENTRAL	12.40	11.56	14.00	15
MOUNTAIN	12.50	12.20	18.76	28
PACIFIC	14.01	11.10	18.00	73
CANADA	18.41	13.27	23.55	6

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 62

TYPICAL WEEKLY SALES PER CHECKOUT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	22,253	17,307	24,885	5733
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	15,101	12,500	17,500	98
10 - 30 MILLION	15,128	9,518	22,700	130
31 - 100 MILLION	19,427	14,423	22,435	389
101 - 250 MILLION	17,000	12,929	23,500	679
251 - 500 MILLION	19,500	15,628	22,200	713
OVER 500 MILLION	24,885	20,352	25,610	3724
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	26,049	21,334	26,050	258
MIDDLE ATLANTIC	20,785	20,780	23,490	932
EAST NORTH CENTRAL	24,885	23,700	24,890	1689
WEST NORTH CENTRAL	18,669	18,660	23,721	293
SOUTHEAST	14,423	12,929	20,352	1142
WEST SOUTH CENTRAL	26,200	15,628	26,220	303
MOUNTAIN	25,610	25,610	25,615	577
PACIFIC	20,582	17,300	26,982	232
CANADA	13,475	11,479	13,690	307
RETAIL AFFILIATION				
CHAIN	22,766	18,141	24,885	5224
INDEPENDENT	19,433	14,548	24,785	509

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 63

TYPICAL SALES PER LABOR HOUR FOR STORE EMPLOYEES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	90.85	86.55	98.00	6167
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	73.62	65.00	86.00	81
10 - 30 MILLION	75.00	67.50	96.00	119
31 - 100 MILLION	91.75	78.00	101.93	378
101 - 250 MILLION	88.00	79.00	100.14	798
251 - 500 MILLION	89.91	84.00	104.07	785
OVER 500 MILLION	89.96	87.99	97.00	4006
REGION - CHAIN STORES				
NORTHEAST	87.85	87.75	94.70	302
MIDDLE ATLANTIC	94.65	94.21	102.10	979
EAST NORTH CENTRAL	89.96	89.00	91.76	1625
WEST NORTH CENTRAL	88.39	88.35	89.00	268
SOUTHEAST	80.59	79.00	89.83	1183
WEST SOUTH CENTRAL	82.64	82.56	87.50	304
MOUNTAIN	97.00	96.50	97.90	549
PACIFIC	130.00	128.15	135.00	207
CANADA	87.99	81.62	88.01	301
REGION - INDEPENDENT STORES				
NORTHEAST	84.75	75.00	94.00	26
MIDDLE ATLANTIC	98.00	73.25	100.00	43
EAST NORTH CENTRAL	84.38	78.00	101.93	138
WEST NORTH CENTRAL	87.20	65.00	92.95	38
SOUTHEAST	83.00	76.14	90.00	106
WEST SOUTH CENTRAL	67.50	56.68	75.37	16
MOUNTAIN	76.75	76.70	89.75	25
PACIFIC	120.15	101.34	126.72	51
CANADA	96.73	73.12	120.34	6

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 64

SALES PER LABOR HOUR AND HOURLY WAGE RATES

(Current & Historical)

	GENERAL DEPT.		GROCERY		MEAT		PRODUCE	
	Sales/ Labor Hr.	Avg. Hrly. Wage Rate	Sales/ Labor Hr.	Avg. Hrly. Wage Rate	Sales/ Labor Hr.	Avg. Hrly. Wage Rate	Sales/ Labor Hr.	Avg. Hrly. Wage Rate
1976	$124.90	$4.23	$147.68	$4.20	$69.93	$5.53	$53.59	$4.54
1977	145.61	4.41	151.91	5.06	77.47	6.32	57.64	5.22
1978	153.51	5.03	163.17	5.48	86.58	6.91	62.97	6.00
1979	173.92	5.19	151.36	6.26	89.93	7.93	67.80	6.75
1980	179.13	5.59	154.39	6.69	91.58	8.13	71.90	6.91
1981	205.36	6.22	174.97	7.53	97.36	9.81	77.12	8.07
1982	204.86	6.31	184.82	7.63	92.72	9.33	75.58	8.00
1983	226.46	6.48	194.10	8.14	99.50	10.57	89.66	9.00
1984	223.95	7.43	193.05	8.56	100.69	11.30	89.96	9.19

Source: Operations Review 1976-1984

TABLE 65

STORE DEVELOPMENT

	All Stores
Total	8,472
New Supermarkets Built	4.1%
Supermarkets that Underwent Remodeling	4.3%
Supermarkets Closed	6.9%

Source: Facts about Store Development, 1984

TABLE 66

TOTAL SIZE OF TYPICAL SUPERMARKET

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	29,600	24,000	33,172	8778
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	14,580	11,000	17,500	107
10 - 30 MILLION	15,500	13,000	20,000	136
31 - 100 MILLION	21,000	16,000	27,000	452
101 - 250 MILLION	22,463	20,000	28,000	863
251 - 500 MILLION	25,000	19,000	32,000	851
OVER 500 MILLION	29,820	29,584	33,178	6369
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	31,846	29,000	31,850	269
MIDDLE ATLANTIC	24,000	20,000	28,000	1219
EAST NORTH CENTRAL	33,172	31,640	33,185	1888
WEST NORTH CENTRAL	26,510	26,500	35,000	316
SOUTHEAST	29,584	29,500	29,596	3100
WEST SOUTH CENTRAL	29,820	20,000	29,830	379
MOUNTAIN	42,000	39,600	42,400	577
PACIFIC	28,500	20,000	32,000	342
CANADA	45,000	33,270	45,005	688
RETAIL AFFILIATION				
CHAIN	31,846	24,000	35,000	6328
INDEPENDENT	20,000	15,000	27,000	549

TABLE 67A

AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7662	320	1160	1710	306	3010	257	133	307	459
NUMBER OF ITEMS	15,379	18,333	14,133	19,400	14,572	13,658	23,595	15,303	15,491	8,660

TABLE 67B

AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7662	5363	398	70	98	371	700	706	5717
NUMBER OF ITEMS	15,379	15,585	14,410	10,338	12,858	14,175	13,813	13,243	16,018

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 68A

AVERAGE PRICE OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	4327	294	888	1396	231	495	228	542	175	78
PRICE OF ITEMS	1.34	1.17	1.25	1.52	1.17	1.06	1.34	1.47	1.31	1.17

TABLE 68B

AVERAGE PRICE OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	4327	4093	234	36	63	209	313	546	3160
PRICE OF ITEMS	1.34	1.35	1.25	1.29	1.28	1.22	1.13	1.18	1.40

NOTE: DATA WEIGHTED BY NUMBER OF STORES

TABLE 69A

CREDIT CARDS

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	8936	375	1231	1801	316	3194	377	597	357	688
PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS	9.2	.5	5.8	28.5	1.6	.3	14.9	21.3	2.5	4.2
TOTAL	8753	375	1231	1801	320	3194	358	597	330	547
PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS	18.7	18.7	13.9	32.1	19.1	12.1	34.4	27.1	13.9	6.9

TABLE 69B

CREDIT CARDS

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	8936	6503	532	107	134	474	829	911	6481
PERCENTAGE ACCEPTING CREDIT CARDS FOR GROCERY ITEMS	9.2	12.1	8.6	13.1	10.4	4.0	10.7	4.3	10.0
TOTAL	8753	6316	536	107	138	474	783	911	6340
PERCENTAGE ACCEPTING CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS	18.7	21.0	11.6	12.1	12.3	6.8	20.9	12.8	20.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 70A

PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	5.0	3.8	11.0	193
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	2.0	1.2	3.1	61
10 - 30 MILLION	2.5	1.8	3.5	33
31 - 100 MILLION	2.1	1.5	4.9	40
101 - 250 MILLION	4.2	2.0	7.6	23
251 - 500 MILLION	3.7	2.3	11.3	14
OVER 500 MILLION	5.0	4.1	11.0	22
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	3.4	3.0	3.5	16
MIDDLE ATLANTIC	5.0	3.7	5.1	23
EAST NORTH CENTRAL	4.1	4.0	4.2	48
WEST NORTH CENTRAL	3.1	3.0	4.6	16
SOUTHEAST	11.0	8.5	11.1	40
WEST SOUTH CENTRAL	15.5	5.0	15.6	10
MOUNTAIN	10.2	10.0	10.3	10
PACIFIC	8.4	1.3	12.0	26
CANADA	3.0	2.7	4.0	4
RETAIL AFFILIATION				
CHAIN	4.1	3.4	6.0	66
INDEPENDENT	2.3	1.5	4.9	126

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 708

PERCENTAGE OF SALES ACCOUNTED FOR BY HABA

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	4.5	3.5	4.6	194
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	2.5	2.0	3.6	63
10 - 30 MILLION	3.0	2.4	3.7	36
31 - 100 MILLION	3.0	2.0	3.4	38
101 - 250 MILLION	3.5	2.6	6.0	23
251 - 500 MILLION	3.0	2.5	3.4	15
OVER 500 MILLION	4.6	4.5	4.7	19
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	3.5	2.0	4.6	18
MIDDLE ATLANTIC	4.8	3.4	7.5	24
EAST NORTH CENTRAL	4.5	3.5	4.6	47
WEST NORTH CENTRAL	2.3	2.2	4.6	16
SOUTHEAST	4.5	3.5	4.6	40
WEST SOUTH CENTRAL	5.0	3.7	6.0	10
MOUNTAIN	7.1	7.0	7.3	10
PACIFIC	6.5	3.0	6.6	25
CANADA	1.4	1.3	1.6	4
RETAIL AFFILIATION				
CHAIN	4.5	3.1	5.0	65
INDEPENDENT	3.0	2.0	3.3	128

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 70C

PERCENTAGE OF SALES ACCOUNTED FOR BY TOBACCO

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	3.0	1.4	4.0	172
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	3.3	2.0	5.0	59
10 - 30 MILLION	3.1	1.5	5.0	27
31 - 100 MILLION	3.0	1.0	4.3	38
101 - 250 MILLION	4.0	2.0	5.0	21
251 - 500 MILLION	2.0	1.3	4.0	12
OVER 500 MILLION	3.0	1.4	3.1	15
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	1.3	1.0	1.4	16
MIDDLE ATLANTIC	1.0	.5	2.9	24
EAST NORTH CENTRAL	2.8	1.5	4.1	35
WEST NORTH CENTRAL	4.5	2.7	4.6	17
SOUTHEAST	3.0	2.3	4.0	38
WEST SOUTH CENTRAL	2.1	2.0	4.3	9
MOUNTAIN	3.0	2.9	3.2	6
PACIFIC	1.5	1.4	4.2	22
CANADA	4.2	4.0	4.3	5
RETAIL AFFILIATION				
CHAIN	3.0	1.4	4.0	58
INDEPENDENT	2.1	1.2	4.0	114

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 71A

SPECIALTY DEPARTMENTS AND SERVICES OFFERED BY SUPERMARKETS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	8689	379	1225	1887	320	3227	381	597	366	307
BEER	80.0	48.5	73.8	88.9	76.6	80.7	82.7	94.8	97.3	32.2
WINE	58.8	29.3	15.8	72.5	20.3	67.6	62.2	83.9	97.3	32.2
DELI WITH CARRY-OUT	54.0	96.6	64.3	74.1	65.9	38.0	40.2	51.1	13.9	62.9
FLORAL/PLANT SHOP	53.2	45.6	22.1	53.2	32.5	65.6	42.3	90.6	33.9	43.0
SCRATCH AND/OR BAKE-OFF BAKERY	45.9	62.0	35.2	65.7	64.7	36.3	26.0	70.7	20.2	35.5
COURTESY BOOTH	43.0	80.5	71.6	24.0	54.4	36.8	68.0	44.1	40.2	24.1
READING CENTER	42.4	27.2	18.0	15.6	22.8	74.6	60.9	38.9	18.6	17.3
PHOTOGRAPHIC SERVICE CENTER	34.5	58.8	21.6	70.3	19.4	17.2	50.7	42.9	30.9	.3
FRESH SEAFOOD	30.2	80.2	47.3	34.6	15.6	12.1	17.1	49.2	40.7	46.3
LIQUOR	17.1	1.3	1.0	12.5	20.0	23.0	5.5	48.9	30.3	-
SERVICE MEAT	17.1	39.3	11.4	22.5	12.2	12.1	15.5	34.3	9.8	13.7
PHARMACY	15.7	4.5	12.5	21.0	12.8	13.2	21.3	28.6	21.0	.3
COSMETIC CENTER	14.9	11.3	16.0	19.7	5.0	8.8	35.2	31.5	15.6	1.0
VIDEO RENTAL	12.2	4.5	4.1	17.8	10.0	9.0	23.4	32.3	8.5	5.5
SALAD BAR	9.5	45.1	16.8	4.7	10.0	7.6	2.9	1.5	3.3	15.6
LUNCH COUNTER/SNACK BAR	8.7	4.2	2.9	18.3	2.5	.7	33.3	20.1	3.0	22.8
CATERING	6.4	2.4	10.5	8.3	33.8	3.3	1.3	3.4	5.2	.3
RESTAURANT	2.7	.3	1.1	.5	12.5	.4	16.3	4.4	10.1	10.1

TABLE 71B

SPECIALTY DEPARTMENTS AND SERVICES OFFERED BY SUPERMARKETS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	8689	6241	547	105	142	483	863	911	6185
BEER	80.0	78.2	67.8	68.6	54.2	75.6	72.0	63.0	84.8
WINE	58.8	56.7	50.1	45.7	42.3	57.6	59.4	42.0	61.9
DELI WITH CARRY-OUT	54.0	60.9	58.5	55.2	60.6	50.7	30.6	44.5	58.8
FLORAL/PLANT SHOP	53.2	41.3	26.5	17.1	31.0	22.2	26.5	39.4	62.5
SCRATCH AND/OR BAKE-OFF BAKERY	45.9	47.9	47.9	37.1	54.2	41.2	32.7	43.6	48.4
COURTESY BOOTH	43.0	42.2	55.9	57.1	50.0	48.7	28.2	55.8	42.4
READING CENTER	42.4	25.5	34.6	46.7	41.5	29.0	28.3	17.3	49.0
PHOTOGRAPHIC SERVICE CENTER	34.5	43.4	37.5	31.4	33.1	30.6	22.7	34.4	36.5
FRESH SEAFOOD	30.2	37.4	48.1	39.0	48.6	45.3	37.8	43.1	25.5
LIQUOR	17.1	11.3	14.1	9.5	4.2	14.9	11.0	19.5	18.2
SERVICE MEAT	17.1	21.3	26.9	21.9	29.6	22.4	15.1	15.0	16.9
PHARMACY	15.7	15.8	6.4	3.8	4.9	3.9	6.6	13.9	18.6
COSMETIC CENTER	14.9	18.5	12.2	12.4	19.7	6.6	3.1	13.7	17.2
VIDEO RENTAL	12.2	12.3	16.5	9.5	11.3	13.9	5.7	4.7	14.1
SALAD BAR	9.5	10.5	17.4	16.2	20.4	10.8	11.8	9.8	8.6
LUNCH COUNTER/SNACK BAR	8.7	11.6	6.2	7.6	11.3	3.1	3.4	14.8	8.9
CATERING	6.4	7.3	18.3	19.0	28.9	11.2	8.6	7.8	4.7
RESTAURANT	2.7	3.1	7.3	5.7	5.6	6.6	1.4	9.3	1.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 72A

PERCENTAGE OF TOTAL STORES CURRENTLY USING PROMOTIONAL TECHNIQUES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6736	311	1213	1887	320	1064	321	594	338	688
TRADING STAMPS	8.9	2.3	1.5	2.6	3.4	40.2	.9	9.1	9.2	-
GAMES	10.9	11.6	4.5	13.0	44.7	6.8	53.0	.2	4.1	-
CONTINUITY PROGRAMS	46.4	71.4	34.1	31.1	84.1	29.2	90.7	87.0	58.9	45.9
IN-STORE COUPONS	65.5	71.4	43.7	87.9	76.9	44.1	72.9	80.6	65.1	51.0

TABLE 72B

PERCENTAGE OF TOTAL STORES CURRENTLY USING PROMOTIONAL TECHNIQUES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6736	6215	521	103	132	466	836	911	4288
TRADING STAMPS	8.9	9.4	3.6	3.9	7.6	4.7	10.8	9.5	9.0
GAMES	10.9	10.8	12.5	22.3	12.1	18.5	5.3	8.2	11.5
CONTINUITY PROGRAMS	46.4	47.4	35.1	49.5	37.1	39.7	62.9	65.2	40.1
IN-STORE COUPONS	65.5	65.8	61.0	65.0	65.9	55.2	49.5	42.0	73.6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 73

TYPICAL SUPERMARKET ADVERTISING COSTS AS A PERCENT OF SALES

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	1.0	.8	1.1	258
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	1.2	1.0	1.7	81
10 - 30 MILLION	1.1	.8	1.4	48
31 - 100 MILLION	1.1	1.0	1.3	53
101 - 250 MILLION	1.1	.5	1.3	35
251 - 500 MILLION	1.0	.8	2.0	19
OVER 500 MILLION	1.0	.9	1.1	22
REGION - CHAIN STORES				
NORTHEAST	1.1	.6	1.1	6
MIDDLE ATLANTIC	1.1	.9	2.1	15
EAST NORTH CENTRAL	1.0	.9	1.1	16
WEST NORTH CENTRAL	.5	.0	1.4	6
SOUTHEAST	1.0	.7	1.0	17
WEST SOUTH CENTRAL	.7	.7	1.0	7
MOUNTAIN	1.0	1.0	1.0	5
PACIFIC	1.3	.7	1.5	9
CANADA	1.1	1.1	1.4	5
REGION - INDEPENDENT STORES				
NORTHEAST	1.0	.7	1.5	17
MIDDLE ATLANTIC	1.7	1.3	2.0	22
EAST NORTH CENTRAL	1.1	.8	1.2	37
WEST NORTH CENTRAL	1.0	.7	1.3	19
SOUTHEAST	1.0	.9	1.2	34
WEST SOUTH CENTRAL	1.2	1.0	1.8	9
MOUNTAIN	.5	.5	.8	12
PACIFIC	1.0	.8	1.2	21
CANADA				1

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 74A

PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	233	20	29	49	25	48	14	16	27	5
NEWSPAPER	44.1	10.6	30.9	49.9	55.3	57.9	49.4	57.6	70.5	37.6
MAILER/FLYER	19.0	57.8	18.7	17.7	4.0	11.8	14.2	15.9	12.8	26.3
TELEVISION	11.5	8.6	8.5	11.2	8.4	21.1	13.7	8.9	4.6	11.8
IN-STORE COUPONS	9.9	14.9	27.3	.4	3.4	.1	3.4	1.2	4.6	.4
RADIO	5.4	5.1	3.4	6.9	5.2	5.9	8.1	6.6	4.3	7.4
BILLBOARDS	.7	0	.4	.4	6.4	.1	2.1	0	.1	.8
OTHER	8.2	2.9	10.5	3.0	17.3	2.9	9.1	9.7	3.2	15.6

TABLE 74B

PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	233	75	158	75	44	49	30	18	17
NEWSPAPER	44.1	42.6	59.0	52.6	46.0	66.4	49.7	41.0	41.1
MAILER/FLYER	19.0	18.7	22.3	28.7	38.7	15.8	15.7	20.7	18.9
TELEVISION	11.5	12.2	3.7	3.1	4.6	3.9	11.9	8.5	13.4
IN-STORE COUPONS	9.9	10.2	6.9	2.4	1.5	6.3	3.6	6.2	12.6
RADIO	5.4	5.5	5.0	5.5	6.3	5.0	5.9	8.8	4.5
BILLBOARDS	.7	.7	.4	.1	.1	.5	.6	1.5	.5
OTHER	8.2	8.8	2.1	3.0	2.7	2.1	12.5	12.8	7.3

NOTE: DATA WEIGHTED BY ADVERTISING DOLLARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 75A

CURRENT USES OF SCANNING POS DATA **

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	166	10	23	44	19	24	11	10	18	7
CHECKER PERFORMANCE	91.0	90.0	87.0	90.9	94.7	91.7	100.0	80.0	94.4	85.7
SPECIALS	81.9	70.0	69.6	86.4	100.0	83.3	72.7	70.0	88.9	71.4
COUPON ACCOUNTING	71.7	60.0	73.9	72.7	89.5	70.8	63.6	70.0	77.8	28.6
WORK SCHEDULING	59.6	40.0	73.9	50.0	57.9	58.3	72.7	60.0	72.2	57.1
NEW PRODUCT EVALUATION	47.6	50.0	34.8	40.9	68.4	41.7	54.5	40.0	61.1	57.1
SHELF ALLOCATION	45.2	40.0	47.8	40.9	68.4	37.5	54.5	50.0	33.3	42.9
MEAT DEPARTMENT ANALYSIS	41.0	40.0	39.1	36.4	42.1	33.3	54.5	50.0	50.0	42.9
PRODUCE DEPARTMENT ANALYSIS	37.3	40.0	13.0	25.0	57.9	29.2	45.5	60.0	66.7	42.9
SHRINK ANALYSIS	23.5	50.0	30.4	18.2	36.8	8.3	18.2	[illegible]	33.3	14.3
PRICE ELASTICITY	16.3	20.0	21.7	9.1	26.3	16.7	-	40.0	11.1	14.3
REORDERING	12.7	10.0	17.4	9.1	21.1	12.5	9.1	20.0	5.6	14.3
OTHER	4.8	10.0	8.7	4.5	-	4.2	-	10.0	-	14.3

TABLE 75B

CURRENT USES OF SCANNING POS DATA **

	ALL COMPANIES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	166	77	88	20	33	41	29	18	25
CHECKER PERFORMANCE	91.0	93.5	88.6	85.0	87.9	95.1	86.2	94.4	96.0
SPECIALS	81.9	77.9	85.2	85.0	84.8	92.7	69.0	72.2	80.0
COUPON ACCOUNTING	71.7	66.2	76.1	75.0	78.8	80.5	65.5	38.9	76.0
WORK SCHEDULING	59.6	67.5	52.3	55.0	54.5	48.8	65.5	66.7	76.0
NEW PRODUCT EVALUATION	47.6	45.5	48.9	60.0	57.6	41.5	41.4	44.4	44.0
SHELF ALLOCATION	45.2	37.7	51.1	80.0	57.6	31.7	41.4	38.9	32.0
MEAT DEPARTMENT ANALYSIS	41.0	39.0	43.2	40.0	42.4	41.5	41.4	44.4	36.0
PRODUCE DEPARTMENT ANALYSIS	37.3	36.4	38.6	45.0	39.4	36.6	34.5	44.4	28.0
SHRINK ANALYSIS	23.5	27.3	20.5	25.0	18.2	19.5	17.2	22.2	44.0
PRICE ELASTICITY	16.3	15.6	17.0	25.0	21.2	9.8	10.3	11.1	24.0
REORDERING	12.7	13.0	12.5	10.0	18.2	12.2	3.4	11.1	20.0
OTHER	4.8	6.5	3.4	-	9.1	-	10.3	5.6	4.0

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INSTITUTE SPEAKS, 1985

TABLE 76

SCANNING INSTALLATION UPDATE

Vendor	Installed	% of Total
NCR Corporation	4,179	36.9%
Data Checker	2,850	25.2
IBM Corporation	2,465	21.8
Data Terminal Systems, Inc.	894	7.9
SWEDA International	723	6.3
TEC America, Inc.	159	1.4
Berkel Incorporated	34	0.3
TOTAL	11,304	100.0%

Total Installations Year End

Installed in	Year End	This Year
1974	13	13
1975	58	45
1976	168	110
1977	306	138
1978	638	332
1979	1,468	830
1980	2,902	1,434
1981	4,592	1,690
1982	6,721	2,129
1983	9,210	2,489
1984	11,165	1,955
MARCH, 1985	11,304	139

INSTALLATIONS BY STATE

California	1,274	New Jersey	185	Maine	50
Florida	843	Oregon	179	Hawaii	48
Texas	820	Tennessee	172	North Dakota	45
Illinois	646	Kansas	167	South Dakota	39
Ohio	476	North Carolina	162	Montana	36
Washington	464	Iowa	161	New Hampshire	33
Pennsylvania	434	Kentucky	134	Rhode Island	27
Missouri	362	Connecticut	108	Dist of Columbia	25
New York	333	Utah	102	Wyoming	25
Wisconsin	266	Oklahoma	101	Delaware	16
				Vermont	7
Indiana	259	Mississippi	99		
Louisiana	249	Arkansas	90	**Total U.S.**	**10,718**
Minnesota	240	Arizona	88		
Michigan	230	Nebraska	83	**Total Canadian**	**586**
Colorado	227	South Carolina	77		
				Adjustments	**94**
Virginia	221	West Virginia	59		
Maryland	215	Nevada	58	**TOTAL**	**11,398**
Georgia	207	New Mexico	57		
Alabama	206	Idaho	56		
Massachusetts	203	Alaska	54		

Source:
Food Marketing Institute,
Scanning Update

TABLE 77A

PERCENTAGE OF SUPERMARKETS SELLING BULK FOODS

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	8920	380	1229	1843	319	3186	321	597	357	688
WITH BULK FOODS	14.1	35.8	11.0	4.1	13.5	15.3	7.5	9.9	27.5	28.6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 77B

AVERAGE NUMBER OF BULK ITEMS CARRIED

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1195	134	123	75	39	453	24	59	91	197
AVERAGE NUMBER OF ITEMS	140	46	65	165	119	204	157	145	136	99

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING BULK FOODS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 78A

PERCENTAGE OF SUPERMARKETS SELLING BULK FOODS

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	8920	6479	540	107	136	480	842	845	6510
WITH BULK FOODS	14.1	13.5	22.6	17.8	29.4	16.3	24.2	10.9	12.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 78B

AVERAGE NUMBER OF BULK ITEMS CARRIED

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1195	827	108	17	35	71	163	92	817
AVERAGE NUMBER OF ITEMS	140	96	94	160	107	85	81	158	156

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING BULK FOODS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 79

PERCENTAGE OF SALES ACCOUNTED FOR BY THE MEAT DEPARTMENT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	18.0	16.4	18.1	7097
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	19.0	16.0	21.0	83
10 - 30 MILLION	18.0	16.5	23.0	95
31 - 100 MILLION	19.0	16.4	21.0	512
101 - 250 MILLION	18.5	17.0	21.0	713
251 - 500 MILLION	18.0	16.0	20.0	787
OVER 500 MILLION	18.0	17.0	18.2	4907
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	16.0	15.2	17.0	423
MIDDLE ATLANTIC	18.0	17.0	18.2	2004
EAST NORTH CENTRAL	18.0	17.0	18.1	1942
WEST NORTH CENTRAL	15.0	14.9	16.2	370
SOUTHEAST	19.0	16.0	20.0	1099
WEST SOUTH CENTRAL	18.0	17.3	20.0	455
MOUNTAIN	17.0	16.5	17.2	54
PACIFIC	14.8	14.2	18.0	582
CANADA	19.0	18.5	19.2	168
RETAIL AFFILIATION				
CHAIN	18.0	16.7	18.3	6618
INDEPENDENT	17.5	16.0	21.0	479

TABLE 80

AVERAGE NUMBER OF EMPLOYEES IN THE MEAT DEPARTMENT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	5	5	8	6738
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	4	3	7	88
10 - 30 MILLION	4	4	5	95
31 - 100 MILLION	5	4	7	541
101 - 250 MILLION	4	3	6	700
251 - 500 MILLION	6	5	7	794
OVER 500 MILLION	6	5	8	4520
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	8	5	12	425
MIDDLE ATLANTIC	5	5	5	1660
EAST NORTH CENTRAL	8	5	8	1929
WEST NORTH CENTRAL	6	5	6	370
SOUTHEAST	4	4	7	1101
WEST SOUTH CENTRAL	7	5	8	484
MOUNTAIN	5	5	5	61
PACIFIC	5	5	5	540
CANADA	8	8	8	168
RETAIL AFFILIATION				
CHAIN	5	5	8	6247
INDEPENDENT	5	4	8	491

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 81

WAGES, SALARIES AND FRINGE BENEFITS AS PERCENTAGE OF MEAT DEPARTMENT SALES

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	10.0	9.0	10.1	179
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	9.0	8.0	11.0	50
10 - 30 MILLION	9.1	9.0	10.0	28
31 - 100 MILLION	10.0	8.0	12.0	37
101 - 250 MILLION	9.0	8.0	10.0	27
251 - 500 MILLION	9.0	7.0	10.0	13
OVER 500 MILLION	10.0	8.8	10.2	24
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	9.0	8.0	11.0	16
MIDDLE ATLANTIC	10.0	9.7	12.0	23
EAST NORTH CENTRAL	9.1	9.0	9.2	44
WEST NORTH CENTRAL	9.0	8.0	11.0	16
SOUTHEAST	7.1	7.0	9.0	31
WEST SOUTH CENTRAL	8.2	8.0	9.0	19
MOUNTAIN	10.0	9.8	10.2	7
PACIFIC	9.2	9.0	13.0	21
CANADA	18.1	18.0	18.5	2
RETAIL AFFILIATION				
CHAIN	10.0	9.0	10.2	68
INDEPENDENT	10.0	8.0	10.4	111

NOTE: DATA WEIGHTED BY 1984 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 82

TYPICAL SALES PER LABOR HOUR FOR MEAT DEPARTMENT EMPLOYEES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	129.00	120.00	146.00	6308
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	100.00	85.00	120.00	57
10 - 30 MILLION	115.00	90.00	130.00	90
31 - 100 MILLION	130.00	111.00	140.00	422
101 - 250 MILLION	120.00	110.00	140.00	688
251 - 500 MILLION	140.00	110.00	143.00	626
OVER 500 MILLION	130.00	126.00	147.00	4425
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	121.00	118.00	142.00	420
MIDDLE ATLANTIC	125.00	120.00	126.00	1962
EAST NORTH CENTRAL	146.00	136.00	147.00	1909
WEST NORTH CENTRAL	120.00	110.00	143.00	166
SOUTHEAST	120.00	107.00	140.00	1019
WEST SOUTH CENTRAL	140.00	125.00	150.00	270
MOUNTAIN	118.00	117.00	120.00	61
PACIFIC	159.00	158.00	160.00	336
CANADA	89.00	87.00	90.00	165
RETAIL AFFILIATION				
CHAIN	128.00	119.00	145.00	5895
INDEPENDENT	125.00	99.00	140.00	413

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 83

AVERAGE POUNDS PER LABOR HOUR FOR MEAT DEPARTMENT EMPLOYEES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	92	85	95	3965
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	72	63	85	11
10 - 30 MILLION	62	60	80	17
31 - 100 MILLION	98	88	115	141
101 - 250 MILLION	97	75	115	172
251 - 500 MILLION	93	89	102	325
OVER 500 MILLION	93	86	93	3299
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	118	117	120	131
MIDDLE ATLANTIC	87	86	89	1275
EAST NORTH CENTRAL	92	90	93	1725
WEST NORTH CENTRAL	115	95	116	37
SOUTHEAST	93	85	135	381
WEST SOUTH CENTRAL	105	104	106	162
MOUNTAIN	76	75	78	7
PACIFIC	109	107	110	247
CANADA				0
RETAIL AFFILIATION				
CHAIN	90	84	94	3793
INDEPENDENT	95	76	118	172

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 84A

PERCENT OF MEAT SALES BY TYPE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	3246	391	656	631	260	403	192	133	553	27
FRESH:										
MEAT	55.4	58.2	56.1	57.3	49.8	48.4	50.9	67.0	57.5	44.8
BEEF	39.3	41.5	41.1	36.9	37.0	33.9	34.9	51.9	42.3	28.3
PORK	12.9	12.6	11.2	16.8	11.8	12.4	12.8	12.3	11.8	11.8
VEAL	1.4	1.5	1.4	2.1	.9	1.1	1.4	.9	1.2	2.3
LAMB	1.9	2.6	2.4	1.6	1.0	1.1	1.8	1.9	2.2	2.3
POULTRY	18.0	19.6	17.7	17.0	21.4	14.8	15.1	8.5	23.0	10.0
FISH	2.9	2.3	2.3	2.3	.5	2.4	4.1	3.0	5.4	6.4
OTHER	1.4	.5	1.3	2.9	.1	.7	.4	0	2.0	0
PROCESSED/FROZEN:										
BACON	5.8	3.6	11.3	3.3	5.2	6.3	5.0	6.9	3.4	3.8
HAM	3.1	2.2	3.0	3.7	2.7	3.9	3.7	4.0	2.2	5.9
OTHER CURED PORK	1.0	1.4	.1	1.3	.2	1.5	1.9	.1	1.1	3.4
LUNCHEON MEAT	3.8	3.7	1.6	5.7	7.9	6.9	5.0	.3	.5	3.8
DELI	.5	.5	0	.2	.2	.4	2.2	.1	.1	17.8
FRANKS	2.6	4.2	.1	3.3	4.4	5.3	4.4	.4	.6	2.0
CHEESE	.5	.2	0	.1	.3	.9	3.2	.4	.7	.1
FROZEN MEAT	2.1	3.0	2.4	1.6	2.2	2.4	1.7	2.0	1.5	1.8
FROZEN FISH	1.7	.4	2.0	1.3	3.6	1.9	2.1	4.8	.9	.2
OTHER	1.8	.5	1.3	1.0	5.4	4.3	.1	2.8	1.1	0

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE. FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 84B

PERCENT OF MEAT SALES BY TYPE

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	3246	2949	297	45	62	269	402	447	2021
FRESH:									
MEAT	55.4	55.1	58.2	60.6	56.8	60.5	54.9	51.4	55.6
BEEF	39.3	39.2	39.1	39.7	39.1	39.4	37.5	35.1	40.5
PORK	12.9	12.7	15.4	17.4	15.1	17.9	14.4	12.0	12.0
VEAL	1.4	1.2	1.7	1.6	1.1	1.4	1.4	2.1	1.3
LAMB	1.9	1.8	2.0	2.0	1.6	1.9	1.6	2.3	1.3
POULTRY	18.0	18.3	15.8	14.2	14.5	16.9	16.3	18.2	18.7
FISH	2.9	3.0	2.4	4.9	2.3	2.4	2.5	3.1	3.1
OTHER	1.4	1.3	1.5	1.0	.1	1.1	.8	3.2	1.1
PROCESSED/FROZEN:									
BACON	5.8	6.0	3.7	3.5	4.1	4.1	3.8	4.1	6.8
HAM	3.1	3.0	3.5	3.2	3.9	2.7	3.1	3.3	3.0
OTHER CURED PORK	1.0	.9	1.5	1.4	2.3	.8	.7	2.4	.6
LUNCHEON MEAT	3.8	3.7	4.9	3.4	5.3	4.7	5.9	4.3	3.1
DELI	.5	.4	.9	1.0	1.1	.4	.5	2.4	0
FRANKS	2.6	2.5	3.3	2.8	3.7	3.0	4.9	2.7	2.0
CHEESE	.5	.3	1.1	.7	1.7	.5	1.6	1.0	.1
FROZEN MEAT	2.1	2.2	1.4	1.4	2.6	1.3	2.3	1.9	2.0
FROZEN FISH	1.7	1.8	1.3	1.5	1.3	1.1	1.5	1.4	1.9
OTHER	1.8	1.9	.5	.3	.5	.5	.7	1.0	2.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE #5

TYPICAL NUMBER OF FRESH MEAT ITEMS CARRIED

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	152	100	250	6184
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	95	68	120	70
10 - 30 MILLION	115	80	145	87
31 - 100 MILLION	135	100	200	488
101 - 250 MILLION	125	75	200	644
251 - 500 MILLION	140	125	180	598
OVER 500 MILLION	200	115	255	4297
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	227	200	300	376
MIDDLE ATLANTIC	80	78	125	1458
EAST NORTH CENTRAL	250	180	255	1747
WEST NORTH CENTRAL	250	125	252	366
SOUTHEAST	125	100	175	1100
WEST SOUTH CENTRAL	132	100	145	464
MOUNTAIN	400	397	402	59
PACIFIC	240	185	400	446
CANADA	200	198	204	168
RETAIL AFFILIATION				
CHAIN	175	102	248	5762
INDEPENDENT	120	90	149	422

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 86A

PERCENTAGE OF MEAT SALES BONELESS VS. BONE-IN, BY TYPE

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7304	425	2040	1943	370	1101	484	190	583	168
CHICKEN:										
TOTAL	226	21	26	54	22	39	26	9	26	3
BONELESS	12.4	9.6	25.2	4.9	15.5	6.7	6.4	4.5	13.9	
BONE-IN	87.6	90.4	74.8	95.1	84.5	93.3	93.6	95.5	86.1	
PORK:										
TOTAL	227	20	27	54	22	40	26	9	26	3
BONELESS	16.4	10.7	13.5	13.9	18.2	17.3	17.8	7.6	37.6	
BONE-IN	83.6	89.3	86.5	86.1	81.8	82.7	82.2	92.4	62.4	
BEEF:										
TOTAL	225	21	26	52	22	41	26	8	26	3
BONELESS	63.6	75.3	72.0	62.4	48.2	67.8	51.7	19.5	61.1	
BONE-IN	36.4	24.7	28.0	37.6	51.8	32.2	48.3	80.5	38.9	

TABLE 86B

PERCENTAGE OF MEAT SALES BONELESS VS. BONE-IN, BY TYPE

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7304	6806	498	89	95	547	713	794	5066
CHICKEN:									
TOTAL	226	84	142	70	31	47	31	19	28
BONELESS	12.4	12.5	12.9	14.5	14.0	8.2	11.6	10.0	13.2
BONE-IN	87.6	87.5	87.1	85.5	86.0	91.8	88.4	90.0	86.8
PORK:									
TOTAL	227	84	143	70	32	47	31	19	28
BONELESS	16.4	16.1	18.8	18.2	18.5	17.0	16.0	10.0	17.3
BONE-IN	83.6	83.9	81.2	81.8	81.5	83.0	84.0	90.0	82.7
BEEF:									
TOTAL	225	85	140	70	30	47	32	18	28
BONELESS	63.6	63.9	60.2	59.2	61.7	57.0	64.0	58.8	65.2
BONE-IN	36.4	36.1	39.8	40.8	38.3	43.0	36.0	41.2	34.8

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 87A

PERCENTAGE OF FRESH BEEF SALES BY TYPE

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7109	425	2040	1905	369	1101	484	67	550	168
U.S.D.A.										
PRIME	1.3	.4	1.1	1.0	3.1	.9	.9	0	0	16.1
CHOICE	79.1	97.2	71.6	88.5	80.5	94.2	75.7	31.6	35.9	83.9
GOOD	1.1	0	0	0	8	0	14.9	0	.3	0
STANDARD	.2	0	0	0	0	.9	1.1	0	.1	0
UNGRADED OR HOUSE BRAND	18.3	2.4	27.3	10.5	15.7	3.9	7.5	68.4	63.6	0

TABLE 87B

PERCENTAGE OF FRESH BEEF SALES BY TYPE

	ALL STORES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TAL	7109	6620	489	88	95	539	688	756	4943
U.S.D.A.									
PRIME	1.3	1.2	2.9	.5	3.7	.3	1.8	3.5	1.0
CHOICE	79.1	78.8	82.3	78.7	78.8	77.3	74.7	63.9	82.2
GOOD	1.1	1.0	2.0	2.3	4.1	3.7	4.5	2.6	0
STANDARD	.2	.2	.2	.2	.3	.1	0	1.7	.1
UNGRADED OR HOUSE BRAND	18.3	18.7	12.6	18.4	13.1	18.5	19.0	28.4	16.7

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 88A

PERCENT OF FRESH BEEF CUTS RECEIVED AT STORES AS:

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7194	425	2039	1943	369	1010	483	184	573	168
CARCASS	4.4	1.3	2.7	3.9	6.2	1.4	15.5	19.6	5.5	0
PRIMALS	41.6	23.4	42.7	25.4	67.9	67.1	60.1	67.8	16.8	52.1
SUBPRIMALS	52.6	72.9	53.6	70.7	25.9	31.4	22.6	12.5	70.9	33.6
RETAIL CUTS	1.5	2.5	1.0	.2	0	.2	1.8	.1	6.7	14.3

TABLE 88B

PERCENT OF FRESH BEEF CUTS RECEIVED AT STORES AS:

	ALL STORES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7194	6722	472	85	85	535	713	710	5066
CARCASS	4.4	3.8	12.4	15.9	10.2	9.9	14.8	10.6	1.1
PRIMALS	41.6	41.0	49.4	51.5	56.1	53.0	49.2	51.0	37.6
SUBPRIMALS	52.6	53.8	35.4	31.0	32.5	31.7	35.8	34.8	60.4
RETAIL CUTS	1.5	1.4	2.8	1.7	.8	5.3	.2	3.6	1.0

TABLE 89A

PERCENT OF TYPES OF PACKAGING FOR FRESH BEEF RECEIVED AT STORES

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6775	425	1826	1911	339	1084	440	6	576	168
VACUUM PACKED	97.2	99.0	99.7	94.8	96.8	99.1	94.5	86.4	94.0	100.0
SOFT FILM OVERWRAPPED	.8	0	0	1.5	0	.2	.1	.3	3.8	0
OTHER	2.0	1.0	.3	3.8	3.1	.7	5.1	13.7	2.2	0

TABLE 89B

PERCENT OF TYPES OF PACKAGING FOR FRESH BEEF RECEIVED AT STORES

	ALL STORES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6775	6318	457	75	90	500	636	673	4801
VACUUM PACKED	97.2	98.0	86.2	85.7	90.6	92.5	91.3	99.7	98.3
SOFT FILM OVERWRAPPED	.8	.6	3.7	4.3	0	1.2	4.1	.2	.3
OTHER	2.0	1.4	10.1	9.9	9.3	6.0	4.0	0	1.3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 90A

PERCENT OF TYPES OF FRESH BEEF CUTS SOLD AT RETAIL

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7288	425	2040	1941	362	1101	484	184	583	168
CONVENTIONAL RETAIL CUTS/PACKAGING	95.3	98.3	95.4	95.0	93.2	93.1	95.5	95.2	97.5	100.0
SUBPRIMAL, VACUUM PACKAGED	3.9	1.6	3.3	4.3	4.0	6.7	4.0	3.4	2.4	0
SUBPRIMAL, NON-VACUUM PACKAGED	.8	.1	1.3	.6	2.8	.3	.4	1.4	.1	0

TABLE 90B

PERCENT OF TYPES OF FRESH BEEF CUTS SOLD AT RETAIL

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7288	6806	482	87	95	533	713	794	5066
CONVENTIONAL RETAIL CUTS/PACKAGING	95.3	95.3	94.9	95.3	97.6	93.8	94.6	96.6	95.3
SUBPRIMAL, VACUUM PACKAGED	3.9	3.9	4.2	3.4	1.5	5.5	4.8	3.3	3.8
SUBPRIMAL, NON-VACUUM PACKAGED	.8	.8	.9	1.2	.9	7	.5	.1	.9

TABLE 91A

PERCENTAGE OF STORES SELLING FROZEN RED MEAT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7304	425	2040	1943	370	1101	484	190	583	168
YES	25.8	-	70.4	.3	15.1	10.1	30.8	64.7	1.2	-
NO	74.1	100.0	29.6	99.6	84.9	89.9	69.2	35.3	98.8	100.0

TABLE 91B

PERCENTAGE OF STORES SELLING FROZEN RED MEAT

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7304	6806	498	89	95	547	713	794	5066
YES	25.8	27.2	7.6	15.7	5.3	13.2	2.8	9.2	33.6
NO	74.1	72.8	92.2	83.1	94.7	86.8	97.2	90.8	66.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 92A

PERCENTAGE OF TYPES OF CHICKENS AND SECTIONS RECEIVED AT STORES

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6899	425	1850	1870	369	1021	452	190	554	168
ICE PACK, WHOLE	11.1	12.6	4.7	5.8	46.3	15.2	13.0	24.0	2.5	45.2
ICE PACK, PARTS	10.3	13.9	18.1	3.9	15.0	7.2	2.7	2.8	.5	54.8
CHILL PACK, WHOLE	26.7	17.3	14.3	44.8	18.0	23.6	37.0	32.2	23.4	0
CHILL PACK, PARTS	47.5	56.1	53.2	45.4	20.4	51.1	42.5	41.0	61.7	0
OTHER	4.4	0	9.8	.1	.3	3.1	4.9	0	12.0	0

TABLE 92B

PERCENTAGE OF TYPES OF CHICKENS AND SECTIONS RECEIVED AT STORES

	ALL STORES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE- PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6899	6415	484	84	95	527	558	747	4888
ICE PACK, WHOLE	11.1	10.1	25.4	39.7	31.8	23.1	25.2	18.7	6.2
ICE PACK, PARTS	10.3	10.0	14.0	14.6	17.9	13.5	16.6	15.4	8.2
CHILL PACK, WHOLE	26.7	27.2	19.9	17.7	8.3	16.7	17.2	14.3	31.3
CHILL PACK, PARTS	47.5	48.4	36.1	24.9	31.5	34.0	37.8	44.8	51.2
OTHER	4.4	4.4	4.7	3.2	10.5	12.7	3.6	6.9	3.1

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 93A

PERCENTAGE OF TYPES OF TURKEYS AND SECTIONS RECEIVED AT STORES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7031	424	1937	1906	360	1101	398	184	553	168
WHOLE, FROZEN	64.8	47.6	70.3	65.7	77.5	64.4	79.2	88.1	29.5	64.9
WHOLE, FRESH	13.2	36.4	13.6	11.0	8.0	5.5	7.7	4.8	20.7	34.3
PARTS, FRESH	10.8	10.1	10.9	9.1	2.8	7.4	.5	0	43.1	.7
PARTS, FROZEN	9.3	3.9	4.5	12.4	2.7	19.1	11.9	3.5	6.5	.2
OTHER	2.0	1.9	.8	2.0	7.8	3.5	.6	3.5	.2	0

TABLE 93B

PERCENTAGE OF TYPES OF TURKEYS AND SECTIONS RECEIVED AT STORES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7031	6562	469	86	94	456	628	794	4973
WHOLE, FROZEN	64.8	64.2	72.3	78.0	75.6	68.9	66.6	68.2	63.2
WHOLE, FRESH	13.2	13.2	13.2	8.8	6.6	13.1	9.4	4.9	15.2
PARTS, FRESH	10.6	11.3	4.0	1.7	3.3	4.6	2.7	10.2	12.8
PARTS, FROZEN	9.3	9.3	8.4	9.3	11.2	11.8	19.2	14.3	6.9
OTHER	2.0	2.0	2.1	2.2	3.3	1.5	2.1	2.5	1.9

TABLE 94A

PERCENTAGE OF GROUND BEEF GROUND IN STORE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7107	434	1939	1909	370	1050	484	183	580	168
GROUND IN STORE	91.0	77.5	97.3	91.0	97.9	92.4	88.2	93.2	75.5	88.6

TABLE 94B

PERCENTAGE OF GROUND BEEF GROUND IN STORE

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7107	6621	486	85	94	482	680	736	5030
GROUND IN STORE	91.0	90.6	97.2	99.2	99.7	95.6	95.2	90.9	89.7

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 95A

PROPORTION OF TOTAL GROUND BEEF SALES BY TYPE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7198	425	2032	1941	370	1101	484	182	495	168
REGULAR	37.0	40.8	32.1	23.5	54.3	54.4	50.5	38.6	42.6	31.7
LEAN	34.8	36.0	31.5	43.4	23.4	29.9	31.9	45.8	30.7	38.2
EXTRA-LEAN	14.4	17.6	8.5	16.5	19.5	14.6	10.4	10.3	23.2	29.6
OTHER	13.9	5.7	27.9	16.6	2.9	1.2	7.3	5.3	3.4	.5

TABLE 95B

PROPORTION OF TOTAL GROUND BEEF SALES BY TYPE

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7198	6718	480	85	95	533	713	794	4978
REGULAR	37.0	36.1	48.8	52.1	57.7	49.4	48.0	44.4	32.2
LEAN	34.8	34.9	33.3	28.8	28.9	34.6	36.8	34.9	34.7
EXTRA-LEAN	14.4	14.4	14.1	16.2	10.8	11.5	11.5	16.2	14.9
OTHER	13.9	14.6	3.9	2.9	2.6	4.5	3.7	4.5	18.2

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 96A

PROPORTION OF TOTAL GROUND BEEF SALES BY PACKAGING TYPES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7080	413	1891	1942	370	1101	472	190	533	163
CHUB PACKS	8.0	6.3	3.3	9.3	3.6	2.7	16.5	7.0	30.7	0
FILM WRAPPED TRAYS	85.4	89.0	94.5	79.1	90.2	88.5	81.5	90.5	60.3	100.0
PRE-FORMED FROZEN PATTIES	2.8	2.8	1.8	1.4	6.0	4.9	2.0	1.3	6.9	0
OTHER	3.8	1.9	.4	10.2	.1	3.9	0	1.2	2.1	0

TABLE 96B

PROPORTION OF TOTAL GROUND BEEF SALES BY PACKAGING TYPES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE- PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7080	6607	473	83	94	517	713	794	4879
CHUB PACKS	8.0	8.3	4.7	5.7	3.6	5.6	2.5	8.8	9.1
FILM WRAPPED TRAYS	85.4	85.3	86.1	80.3	83.2	90.6	88.1	81.9	85.1
PRE-FORMED FROZEN PATTIES	2.8	2.8	2.7	2.6	1.6	2.2	3.2	8.4	1.9
OTHER	3.8	3.6	6.5	11.3	11.5	1.6	6.2	.8	3.9

TABLE 97A

LOCATION OF DELI DEPARTMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7293	425	2040	1942	370	1101	474	190	583	168
INCLUDED IN MEAT DEPARTMENT	25.1	10.1	59.3	2.4	62.7	12.1	4.0	34.2	10.5	14.3
IN A DIFFERENT DEPARTMENT	71.4	89.9	40.7	97.3	30.8	72.3	91.6	65.3	85.6	83.9
DO NOT HAVE ANY DELIS	3.4	-	-	.3	6.5	15.6	4.4	.5	3.9	1.8

TABLE 97B

LOCATION OF DELI DEPARTMENT

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE- PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7293	6806	487	88	95	537	713	794	5066
INCLUDED IN MEAT DEPARTMENT	25.1	25.5	20.1	29.5	28.4	30.7	28.6	12.7	25.9
IN A DIFFERENT DEPARTMENT	71.4	71.3	72.9	44.3	63.2	66.7	66.5	87.3	70.8
DO NOT HAVE ANY DELIS	3.4	3.2	7.0	26.1	8.4	2.6	4.9	-	3.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 98A

PRODUCTS INCLUDED IN TYPICAL DELI DEPARTMENT **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6718	425	2039	1936	335	929	392	189	308	165
CHEESE	94.9	97.4	95.9	95.5	98.8	93.4	94.1	98.4	78.2	100.0
PIZZA	82.6	67.5	71.7	93.4	93.4	80.0	83.2	94.7	85.4	100.0
DESSERTS	82.0	84.0	94.1	91.5	99.4	79.8	40.1	66.1	26.0	14.5
SANDWICHES	81.9	95.1	76.2	93.3	99.7	92.5	79.6	70.9	23.4	14.5
SALADS	75.6	97.6	36.8	95.6	99.7	89.6	84.4	74.1	85.4	100.0
ENTREES	73.8	60.7	81.7	74.5	86.3	79.1	66.6	65.6	50.6	14.5
OTHER	55.0	47.1	60.8	78.7	81.2	38.2	24.0	1.6	1.6	-

TABLE 98B

PRODUCTS INCLUDED IN TYPICAL DELI DEPARTMENT **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6718	6292	426	60	75	474	649	791	4666
CHEESE	94.9	95.4	88.5	71.7	90.7	92.2	87.8	90.9	97.3
PIZZA	82.6	83.4	70.0	53.3	61.3	70.5	68.0	90.9	85.1
DESSERTS	82.0	83.1	65.7	53.3	68.0	76.8	56.7	77.2	87.5
SANDWICHES	81.9	82.0	80.0	76.7	84.0	78.9	81.5	75.3	83.3
SALADS	75.6	74.7	89.4	81.7	94.7	84.0	78.1	85.5	72.4
ENTREES	73.8	74.8	57.7	55.0	56.0	60.5	57.5	38.0	84.0
OTHER	55.0	57.2	21.8	25.0	21.3	42.0	15.7	32.2	66.5

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 99A

PERCENT OF MEAT SUPPLIED BY

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7174	425	1968	1940	370	1101	481	142	579	168
COMPANY-OWNED WAREHOUSE OR PROCESSING PLANT	69.6	59.9	76.3	76.7	58.1	60.0	57.3	83.2	66.7	54.6
PACKER DIRECT DELIVER	14.4	17.9	11.7	6.6	22.9	25.4	19.1	5.5	19.5	14.3
WHOLESALER DIRECT DELIVER	16.0	22.2	12.1	16.7	19.0	14.6	23.6	11.4	13.9	31.2

TABLE 99B

PERCENT OF MEAT SUPPLIED BY

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE- PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7174	6686	488	83	95	543	665	722	5066
COMPANY-OWNED WAREHOUSE OR PROCESSING PLANT	69.6	73.4	16.7	20.7	16.5	38.7	21.0	55.2	83.1
PACKER DIRECT DELIVER	14.4	13.7	24.4	25.0	16.6	25.1	29.0	34.2	8.3
WHOLESALER DIRECT DELIVER	16.0	12.9	58.9	54.3	66.7	36.1	50.0	10.6	8.6

TABLE 100A

PERCENTAGE OF MEAT DEPARTMENT SALES DEVOTED TO SERVICE AND SELF-SERVICE MEATS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6135	424	2039	798	368	1091	484	182	581	168
SERVICE MEATS	7.7	.9	4.8	6.2	2.0	18.8	4.3	31.0	.5	18.5
SELF-SERVICE MEATS	92.3	99.1	95.2	93.8	97.7	81.2	95.7	69.0	99.5	81.5

TABLE 100B

PERCENTAGE OF MEAT DEPARTMENT SALES DEVOTED TO SERVICE AND SELF-SERVICE MEATS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE- PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6135	5674	461	80	93	531	703	753	3975
SERVICE MEATS	7.7	7.8	7.3	19.3	6.8	2.1	11.5	17.5	5.7
SELF-SERVICE MEATS	92.3	92.2	92.7	80.7	93.2	97.9	88.4	82.5	94.3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 101A

OPEN DATING PRACTICES FOR MEAT **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7023	403	1897	1939	368	1101	478	136	533	168
FRESH CUT MEAT										
SELL BY DATE	63.9	56.3	83.0	75.5	64.4	43.6	68.4	2.2	33.6	-
BETTER IF USED BY DATE	.3	-	-	.7	3.0	-	-	-	-	-
EXPIRATION DATE	27.7	42.9	11.5	26.0	21.2	51.7	28.9	5.9	47.1	1.8
PACK DATE	8.5	.5	.4	1.2	10.6	4.6	24.3	91.9	12.6	100.0
NOT DATED	5.4	10.9	5.1	8.8	5.4	.2	-	-	8.6	-
PRIVATE LABEL, PRE-PACKAGED, PROCESSED MEAT										
SELL BY DATE	46.7	42.4	29.0	75.3	66.3	33.6	58.2	2.2	38.3	-
BETTER IF USED BY DATE	4.6	-	.2	2.8	14.9	1.3	4.6	2.2	.4	98.2
EXPIRATION DATE	46.0	56.8	69.4	21.1	19.8	51.8	48.1	97.1	51.0	-
PACK DATE	3.5	.5	-	.1	5.4	.7	.2	-	39.6	-
NOT DATED	1.1	.2	-	3.8	-	-	-	-	-	-

TABLE 101B

OPEN DATING PRACTICES FOR MEAT **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7023	6561	462	78	91	514	665	794	4881
FRESH CUT MEAT									
SELL BY DATE	63.9	65.9	36.1	30.8	30.8	32.9	48.4	40.4	74.3
BETTER IF USED BY DATE	.3	.2	2.8	2.6	1.1	1.9	1.7	-	-
EXPIRATION DATE	27.7	26.3	47.0	35.9	54.9	55.3	32.3	43.7	20.9
PACK DATE	8.5	7.7	20.3	34.6	8.9	17.3	23.0	7.3	5.4
NOT DATED	5.4	5.5	3.2	5.1	12.1	2.1	6.5	9.1	4.9
PRIVATE LABEL, PRE PACKAGED, PROCESSED MEAT									
SELL BY DATE	46.7	47.9	29.7	29.5	26.4	17.9	41.5	38.5	52.4
BETTER IF USED BY DATE	4.6	4.1	11.7	16.7	15.4	8.9	7.8	6.8	2.9
EXPIRATION DATE	46.0	45.9	47.2	48.7	48.4	51.4	43.2	43.7	46.1
PACK DATE	3.5	3.4	5.2	9.0	-	-	7.8	-	3.8
NOT DATED	1.1	1.1	.2	1.3	-	-	-	-	1.5

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 102A

MEAT-RELATED SERVICES AVAILABLE TO CUSTOMERS **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6933	333	2028	1909	348	1027	374	184	562	168
MEAT RECIPES	87.6	99.7	98.4	91.0	93.1	43.0	89.0	99.5	99.3	100.0
STORE COUPONS FOR MEAT ITEMS	79.0	70.9	95.2	82.1	85.6	56.8	69.5	69.0	84.9	-
NUTRITION INFORMATION	62.4	47.4	64.5	72.5	69.0	43.0	71.1	1.1	63.3	100.0
MEAT CUTTING CHARTS /EXPLANATIONS	50.3	87.1	16.2	34.3	17.2	60.6	76.2	100.0	14.2	16.1
CUSTOMER MEAT INFORMATION CENTER	6.0	3.6	9.5	4.3	.6	4.4	15.5	.5	.2	14.3
COOKING CLASSES INVOLVING MEAT	2.6	12.9	-	1.7	-	3.6	2.4	26.6	1.4	-
OTHER	6.3	-	18.8	-	-	5.3	.8	-	-	-

TABLE 102B

MEAT-RELATED SERVICES AVAILABLE TO CUSTOMERS **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6933	6520	413	68	82	417	649	739	4978
MEAT RECIPES	87.6	87.9	83.1	73.5	67.1	94.0	68.6	100.0	88.2
STORE COUPONS FOR MEAT ITEMS	79.0	80.4	57.6	47.1	54.9	71.2	49.0	74.3	85.1
NUTRITION INFORMATION	62.4	63.8	39.2	30.9	31.7	47.2	36.4	40.2	71.3
MEAT CUTTING CHARTS /EXPLANATIONS	50.3	50.4	47.7	54.4	23.2	50.6	66.7	54.0	48.0
CUSTOMER MEAT INFORMATION CENTER	6.0	5.5	13.8	11.8	2.4	22.1	7.6	16.1	3.0
COOKING CLASSES INVOLVING MEAT	2.6	2.1	9.4	4.4	3.7	13.2	7.4	3.5	.9
OTHER	6.3	6.5	3.9	2.9	4.9	2.4	6.5	-	7.6

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 103A

TRAINING PROGRAM AVAILABLE FOR MEAT DEPARTMENT EMPLOYEES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	226	21	27	51	21	41	26	9	27	3
ON-THE-JOB TRAINING PROGRAM FOR MEAT DEPARTMENT EMPLOYEES	80.1	85.7	70.4	82.4	71.4	75.6	88.5	66.7	88.9	
TOTAL	226	21	27	51	21	41	26	9	27	3
OFF-THE-JOB TRAINING PROGRAM FOR MEAT DEPARTMENT EMPLOYEES	5.8	-	3.7	3.9	14.3	9.8	3.8	-	7.4	

TABLE 103B

TRAINING PROGRAM AVAILABLE FOR MEAT DEPARTMENT EMPLOYEES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	226	84	142	68	32	48	31	19	28
ON-THE-JOB TRAINING PROGRAM FOR MEAT DEPARTMENT EMPLOYEES	80.1	83.3	78.2	72.1	84.4	75.0	90.3	89.5	85.7
TOTAL	226	84	142	68	32	48	31	19	28
OFF-THE-JOB TRAINING PROGRAM FOR MEAT DEPARTMENT EMPLOYEES	5.8	10.7	2.8	2.9	3.1	-	9.7	15.8	14.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

MEAT OPERATIONS

TABLE 104A

PROPORTION OF TOTAL LINEAR FEET OF MEAT CASES BY CASE TYPE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6658	289	1862	1845	350	1044	483	66	575	144
SINGLE DECK FRESH MEAT										
% COMPANIES REPORTING	61.1	95.5	95.2	17.8	40.6	96.0	42.7	87.9	49.4	-
AVERAGE LINEAR FEET	60.2	80.8	51.0	48.5	57.6	69.5	65.9	53.3	76.2	0
SINGLE DECK FROZEN MEAT										
% COMPANIES REPORTING	64.7	72.3	79.8	76.7	20.9	70.3	27.1	84.8	34.8	-
AVERAGE LINEAR FEET	31.6	32.9	38.1	31.2	52.5	24.2	25.4	15.0	12.3	0
MULTI-DECK FRESH MEAT										
% COMPANIES REPORTING	80.5	68.9	99.4	97.3	92.6	13.9	72.7	98.5	84.5	100.0
AVERAGE LINEAR FEET	45.6	33.7	31.1	59.4	55.6	19.7	60.9	33.3	44.1	52.4
PROCESSED MEAT, 3 DECK										
% COMPANIES REPORTING	27.8	38.4	8.5	32.5	22.3	46.6	35.2	13.6	16.9	100.0
AVERAGE LINEAR FEET	29.9	28.1	29.8	27.7	38.4	28.9	26.1	27.1	54.4	27.9
PROCESSED MEAT, 5 DECK										
% COMPANIES REPORTING	70.1	47.4	87.3	66.6	83.4	59.6	73.1	90.9	36.0	97.9
AVERAGE LINEAR FEET	35.4	22.9	30.9	45.6	42.0	29.9	40.9	36.2	20.9	28.0
OTHER										
% COMPANIES REPORTING	38.6	27.3	8.3	81.2	74.9	4.8	65.0	13.6	34.1	2.1
AVERAGE LINEAR FEET	23.5	23.0	27.7	21.3	31.0	14.3	32.6	40.0	14.1	58.0

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 104B

PROPORTION OF TOTAL LINEAR FEET OF MEAT CASES BY CASE TYPE

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6658	6208	450	73	89	486	666	698	4646
SINGLE DECK FRESH MEAT									
% COMPANIES REPORTING	61.1	59.6	82.0	76.7	88.8	81.7	70.4	81.9	53.7
AVERAGE LINEAR FEET	60.2	61.7	45.0	39.5	36.1	50.3	59.4	65.4	61.9
SINGLE DECK FROZEN MEAT									
% COMPANIES REPORTING	64.7	66.0	46.4	42.5	38.2	46.5	63.4	70.8	66.7
AVERAGE LINEAR FEET	31.6	32.1	21.5	16.2	18.6	26.2	20.0	32.1	33.7
MULTI-DECK FRESH MEAT									
% COMPANIES REPORTING	80.5	81.4	68.2	53.4	74.2	65.4	67.0	60.7	87.5
AVERAGE LINEAR FEET	45.6	45.7	43.7	32.7	38.8	60.7	41.0	53.2	44.3
PROCESSED MEAT, 3 DECK									
% COMPANIES REPORTING	27.8	26.2	50.2	50.7	36.0	45.9	63.4	35.0	19.3
AVERAGE LINEAR FEET	29.9	30.5	25.8	24.2	22.1	30.1	27.8	29.8	31.4
PROCESSED MEAT, 5 DECK									
% COMPANIES REPORTING	70.1	71.5	50.0	43.8	40.4	48.1	44.7	55.4	79.2
AVERAGE LINEAR FEET	35.4	35.8	26.9	25.3	24.2	27.6	23.5	29.4	37.6
OTHER									
% COMPANIES REPORTING	38.6	39.5	25.6	31.5	39.3	13.2	21.2	41.8	43.3
AVERAGE LINEAR FEET	23.5	23.7	20.3	18.9	17.8	14.0	21.2	29.5	23.3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 105

TYPICAL PERCENTAGE OF TOTAL SELLING AREA DEVOTED TO -- TOTAL MEAT DEPARTMENT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	12.0	6.0	15.0	4656
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	15.0	7.0	20.0	41
10 - 30 MILLION	10.0	5.0	15.0	67
31 - 100 MILLION	14.0	6.0	16.0	245
101 - 250 MILLION	10.0	8.0	15.0	567
251 - 500 MILLION	15.0	10.0	20.0	291
OVER 500 MILLION	11.5	5.5	14.5	3445
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	6.0	3.0	12.0	301
MIDDLE ATLANTIC	15.5	15.0	16.0	1369
EAST NORTH CENTRAL	6.0	6.0	6.5	1404
WEST NORTH CENTRAL	7.0	6.5	10.0	105
SOUTHEAST	15.0	12.0	15.5	893
WEST SOUTH CENTRAL	6.5	6.0	13.0	317
MOUNTAIN	10.0	9.5	10.5	54
PACIFIC	8.5	8.0	11.0	69
CANADA	15.0	14.5	15.5	144
RETAIL AFFILIATION				
CHAIN	12.5	6.0	15.5	4401
INDEPENDENT	10.0	8.0	15.0	255

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 106

TYPICAL PERCENTAGE OF STORE AREA DEVOTED TO MEAT RECEIVING, PREPARATION AND STORAGE

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	7.0	6.0	14.0	4818
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	10.0	5.0	15.0	54
10 - 30 MILLION	10.0	6.0	10.0	77
31 - 100 MILLION	10.0	6.0	15.0	237
101 - 250 MILLION	8.0	4.0	10.0	567
251 - 500 MILLION	11.0	10.0	12.0	292
OVER 500 MILLION	6.7	6.6	14.0	3591
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	3.0	2.0	3.0	303
MIDDLE ATLANTIC	7.0	6.5	7.0	1315
EAST NORTH CENTRAL	14.0	10.0	14.3	1530
WEST NORTH CENTRAL	6.0	4.0	10.0	126
SOUTHEAST	10.0	3.0	10.5	867
WEST SOUTH CENTRAL	5.0	3.0	10.0	406
MOUNTAIN	10.0	9.5	10.1	54
PACIFIC	9.7	5.0	10.0	73
CANADA	10.0	9.5	10.2	144
RETAIL AFFILIATION				
CHAIN	7.0	6.0	14.0	4520
INDEPENDENT	10.0	6.0	10.3	298

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 107A

AVERAGE NUMBER OF PACKER BRANDS CARRIED BY MEAT DEPARTMENT

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7299	424	2040	1942	368	1101	484	190	582	168
BONELESS HAMS	6.5	6.8	7.5	5.3	7.6	6.0	7.1	5.9	5.1	11.3
WEINERS FRANKS	12.2	14.0	13.6	11.5	17.1	15.6	9.7	7.8	3.0	9.9
BACON	11.8	11.6	11.4	11.3	14.8	15.0	10.4	9.3	9.3	9.9

TABLE 107B

AVERAGE NUMBER OF PACKER BRANDS CARRIED BY MEAT DEPARTMENT

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7299	6806	493	84	95	547	713	794	5066
BONELESS HAMS	6.5	6.6	5.4	5.2	4.4	5.9	5.3	5.3	7.0
WEINERS FRANKS	12.2	12.4	9.1	8.3	8.6	9.9	10.5	13.9	12.5
BACON	11.8	12.0	8.4	7.5	7.7	9.3	9.3	11.9	12.5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 108A

POINT-OF-PURCHASE DISPLAYS USED TO PROMOTE MEAT PRODUCTS **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	7227	425	2039	1930	370	1058	481	190	566	168
PACKAGE LABELS	94.2	90.8	97.2	95.8	97.3	93.1	82.3	96.8	88.3	100.0
RAIL STRIPS	92.0	66.1	99.8	92.3	96.5	95.5	86.7	94.2	74.6	98.2
POSTERS	83.6	35.8	79.1	98.1	79.7	98.4	87.3	96.3	49.1	100.0
RECIPES	77.8	73.2	93.5	88.7	86.8	40.7	72.3	31.6	64.5	100.0
MOBILES	61.3	20.7	78.1	85.1	19.2	59.0	30.8	5.8	39.9	14.3
OTHER	9.7	25.6	6.0	12.4	3.5	6.3	21.0	25.3	-	-

TABLE 108B

POINT-OF-PURCHASE DISPLAYS USED TO PROMOTE MEAT PRODUCTS **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	7227	6748	479	83	95	544	688	751	5066
PACKAGE LABELS	94.2	94.5	90.6	85.5	93.7	84.6	74.1	87.6	99.1
RAIL STRIPS	92.0	92.6	83.7	66.3	72.6	88.6	95.1	80.2	94.5
POSTERS	83.6	83.4	87.1	89.2	94.7	85.1	83.3	84.8	83.0
RECIPES	77.8	78.8	63.3	51.8	44.2	70.2	66.3	77.9	81.2
MOBILES	61.3	61.5	58.2	56.6	57.9	48.3	69.0	51.7	63.2
OTHER	9.7	9.2	16.3	9.6	15.8	12.3	26.0	21.2	5.3

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

MEAT OPERATIONS

TABLE 109A

SCANNING OF MEAT PRODUCTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5536	364	1723	1641	351	439	225	138	487	168
HAVE SCANNERS, BUT DO NOT SCAN MEAT PRODUCTS	12.7	6.9	5.5	3.8	.3	-	.4	93.5	51.3	83.9
SCAN MEAT PRODUCTS	87.3	93.1	94.5	96.2	99.7	100.0	99.6	6.5	48.7	16.1
PERCENT OF MEAT PRODUCTS SCANNED	67.7	90.9	39.0	89.3	84.1	74.3	66.7	51.3	51.1	99.7

TABLE 109B

SCANNING OF MEAT PRODUCTS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5536	5241	295	31	43	332	466	543	4121
HAVE SCANNERS, BUT DO NOT SCAN MEAT PRODUCTS	12.7	13.0	8.5	6.5	2.3	38.9	6.9	8.7	12.0
SCAN MEAT PRODUCTS	87.3	87.0	91.5	93.5	97.7	61.1	93.1	91.3	88.0
PERCENT OF MEAT PRODUCTS SCANNED	67.7	67.5	71.3	66.4	75.5	57.6	60.1	83.4	66.9

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

RETAIL FISH AND SEAFOOD OPERATIONS

TABLE 110A

PERCENTAGE OF STORES CARRYING SEAFOOD

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6501	407	1895	1773	260	1032	376	122	462	174
CARRY FRESH SEAFOOD	85.8	99.5	95.0	85.8	36.5	84.0	69.4	89.3	98.9	33.9
CARRY FROZEN SEAFOOD	97.7	97.1	94.9	99.4	98.8	99.6	97.1	92.6	99.1	100.0

RETAIL FISH AND SEAFOOD OPERATIONS

TABLE 110B

PERCENTAGE OF STORES CARRYING SEAFOOD

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6501	6086	415	95	98	372	426	902	4608
CARRY FRESH SEAFOOD	85.8	87.0	67.0	60.0	55.1	64.2	76.5	65.5	93.5
CARRY FROZEN SEAFOOD	97.7	98.2	89.6	93.7	98.0	91.4	84.7	99.7	99.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 111

SIZE IN SQUARE FEET OF AVERAGE SUPERMARKET WITH FRESH SEAFOOD

	MEDIAN	MIDDLE RANGE		N=
TOTAL	31,000	25,000	35,000	4022
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	20,000	13,500	25,000	52
10 - 30 MILLION	20,500	16,000	35,000	38
31 - 100 MILLION	20,000	18,000	35,200	213
101 - 250 MILLION	30,000	18,000	30,060	279
251 - 500 MILLION	30,000	28,000	35,000	534
OVER 500 MILLION	31,050	25,010	35,200	2906
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	27,500	27,470	35,000	286
MIDDLE ATLANTIC	31,010	25,000	31,020	1683
EAST NORTH CENTRAL	31,100	29,940	30,000	316
WEST NORTH CENTRAL	35,020	35,000	37,500	92
SOUTHEAST	25,000	22,000	40,000	854
WEST SOUTH CENTRAL	55,500	35,000	55,510	248
MOUNTAIN	34,970	30,000	35,000	109
PACIFIC	35,010	35,000	35,040	375
CANADA	20,000	19,990	35,000	59
RETAIL AFFILIATION				
CHAIN	31,030	24,950	35,070	3792
INDEPENDENT	25,000	18,000	35,000	230

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE. FOOD MARKETING INDUSTRY SPEAKS. 1985

TABLE 112A

PERCENTAGE OF TOTAL RETAIL SALES ACCOUNTED FOR BY FROZEN SEAFOOD

	MEDIAN	MIDDLE RANGE		N=
TOTAL	1.00	.85	1.01	4135
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	.50	.40	1.50	21
10 - 30 MILLION	1.00	.50	1.05	35
31 - 100 MILLION	1.25	.80	3.00	167
101 - 250 MILLION	1.03	1.00	1.02	87
251 - 500 MILLION	1.00	.07	1.01	345
OVER 500 MILLION	1.02	.87	1.00	3480
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	.25	.01	.50	319
MIDDLE ATLANTIC	1.00	.97	1.02	1594
EAST NORTH CENTRAL	.85	.79	.86	1447
WEST NORTH CENTRAL	.50	.47	.52	70
SOUTHEAST	1.50	1.48	2.00	324
WEST SOUTH CENTRAL	1.00	.98	1.03	59
MOUNTAIN	2.05	2.00	2.07	69
PACIFIC	4.00	1.00	4.05	200
CANADA	1.00	.99	2.00	53
RETAIL AFFILIATION				
CHAIN	1.03	.86	1.05	3971
INDEPENDENT	1.00	.30	1.50	164

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 112B

PERCENTAGE OF TOTAL RETAIL SALES ACCOUNTED FOR BY FRESH SEAFOOD

	MEDIAN	MIDDLE RANGE		N=
TOTAL	1.00	.45	1.05	4135
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	1.00	.95	2.00	21
10 - 30 MILLION	2.00	.50	2.10	35
31 - 100 MILLION	1.50	.50	3.00	167
101 - 250 MILLION	1.00	.95	1.44	87
251 - 500 MILLION	1.05	1.00	2.00	345
OVER 500 MILLION	1.10	.50	1.00	3480
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	1.00	.95	1.25	319
MIDDLE ATLANTIC	1.00	.95	1.30	1594
EAST NORTH CENTRAL	.45	.40	.50	1447
WEST NORTH CENTRAL	.55	.50	.60	70
SOUTHEAST	.75	.70	1.00	324
WEST SOUTH CENTRAL	2.10	2.00	2.15	59
MOUNTAIN	2.55	2.50	2.70	69
PACIFIC	3.00	2.22	3.05	200
CANADA	2.03	2.00	6.00	53
RETAIL AFFILIATION				
CHAIN	1.04	.45	1.07	3971
INDEPENDENT	1.24	.50	2.00	164

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 113A

PERCENTAGE OF TOTAL SEAFOOD SALES ACCOUNTED FOR BY:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	4947	348	1647	1502	82	700	185	47	377	59
FROZEN SEAFOOD	57.1	23.7	56.4	64.3	57.5	71.0	43.7	53.2	46.5	38.3
FRESH SEAFOOD	42.4	76.2	42.4	35.7	42.5	28.9	56.3	46.8	53.4	60.7
OTHER	.4	.1	1.2	0	0	0	0	0	.1	1.0

TABLE 113B

PERCENTAGE OF TOTAL SEAFOOD SALES ACCOUNTED FOR BY:

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	4947	4728	219	46	35	201	268	404	3993
FROZEN SEAFOOD	57.1	58.0	37.6	40.7	41.1	44.8	30.9	55.0	60.1
FRESH SEAFOOD	42.4	41.6	61.6	57.9	58.9	54.5	69.0	45.0	39.5
OTHER	.4	.4	.6	1.4	0	.4	1	0	.5

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 114A

NUMBER OF COMPANIES INCLUDING SEAFOOD ITEMS AS: **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
FRESH (TOTAL)	5442	362	1799	1507	95	867	251	48	454	59
SEAFOOD DEPARTMENT	50.2	15.5	26.3	94.0	74.7	33.0	22.7	95.8	66.3	40.7
MEAT DEPARTMENT	87.6	50.8	77.9	98.6	90.5	98.2	79.7	100.0	99.8	100.0
ANOTHER DEPARTMENT	8.9	48.9	-	1.3	-	30.0	-	-	-	44.1
OTHER	.1	-	-	-	4.2	-	-	-	-	-
FROZEN (TOTAL)	5167	405	1753	1506	82	616	252	48	446	59
SEAFOOD DEPARTMENT	38.6	22.2	3.0	76.0	80.5	45.0	7.5	95.8	62.3	40.7
MEAT DEPARTMENT	94.4	61.0	97.5	99.1	100.0	97.6	81.0	100.0	98.7	94.9
ANOTHER DEPARTMENT	17.9	42.0	26.1	2.2	-	28.2	21.4	14.6	5.8	5.1
OTHER	7.6	.7	22.2	-	-	-	-	-	.2	-

TABLE 114B

NUMBER OF COMPANIES INCLUDING SEAFOOD ITEMS AS: **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
FRESH (TOTAL)	5442	5172	270	53	50	218	326	530	4265
SEAFOOD DEPARTMENT	50.2	50.1	52.2	28.3	46.0	34.9	61.0	71.3	47.8
MEAT DEPARTMENT	87.6	88.3	75.2	77.4	68.0	84.4	85.3	90.9	87.9
ANOTHER DEPARTMENT	8.9	8.5	16.7	3.8	-	12.4	10.7	2.1	9.6
OTHER	.1	-	1.1	-	-	.5	.9	-	-
FROZEN (TOTAL)	5167	4917	250	49	43	223	277	530	4045
SEAFOOD DEPARTMENT	38.6	39.0	31.6	12.2	20.9	21.5	44.4	37.5	39.9
MEAT DEPARTMENT	94.4	95.4	74.8	77.6	62.8	87.0	92.8	90.9	96.0
ANOTHER DEPARTMENT	17.9	17.2	32.0	14.3	27.9	23.3	29.9	6.8	18.2
OTHER	7.6	7.8	3.2	8.2	9.3	-	-	-	9.5

** MULTIPLE RESPONSES ACCEPTED.

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 115A

PERCENTAGE OF FRESH SEAFOOD SECTIONS OFFERING SERVICE AND SELF-SERVICE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5463	405	1796	1414	95	867	261	109	457	59
SELF-SERVICE	66.9	50.5	69.0	64.9	24.9	72.5	48.5	84.1	83.6	68.6
SERVICE	33.1	49.5	31.0	35.1	75.1	27.5	51.5	15.9	16.4	31.4

TABLE 115B

PERCENTAGE OF FRESH SEAFOOD SECTIONS OFFERING SERVICE AND SELF-SERVICE

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5463	5199	264	55	49	232	326	493	4308
SELF-SERVICE	66.9	67.8	49.7	71.3	32.9	52.4	61.7	52.6	70.0
SERVICE	33.1	32.2	50.4	28.7	67.1	47.8	38.3	47.4	30.0

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 116A

AVERAGE GROSS MARGIN OF SEAFOOD SECTION --TOTAL SEAFOOD

	MEDIAN	MIDDLE RANGE		N*
TOTAL	28.0	27.0	30.7	4912
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	30.0	26.0	35.0	23
10 - 30 MILLION	28.0	23.6	30.0	40
31 - 100 MILLION	30.1	30.0	34.0	219
101 - 250 MILLION	30.0	28.0	33.0	309
251 - 500 MILLION	30.0	23.0	30.2	550
OVER 500 MILLION	28.1	26.5	31.0	3771
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	29.8	26.0	30.0	400
MIDDLE ATLANTIC	28.0	27.0	28.1	1795
EAST NORTH CENTRAL	30.7	30.6	30.9	1502
WEST NORTH CENTRAL	25.0	24.8	33.0	94
SOUTHEAST	25.0	23.0	30.0	324
WEST SOUTH CENTRAL	30.0	26.0	30.2	214
MOUNTAIN	23.2	23.0	30.0	109
PACIFIC	25.0	25.1	33.0	424
CANADA	37.0	35.0	37.1	50
RETAIL AFFILIATION				
CHAIN	28.4	27.1	30.9	4717
INDEPENDENT	30.0	27.0	35.0	195

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 116B

AVERAGE GROSS MARGIN OF SEAFOOD SECTION --FRESH SEAFOOD

	MEDIAN	MIDDLE RANGE		N=
TOTAL	26.5	24.0	30.0	5106
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	28.0	25.0	40.0	38
10 - 30 MILLION	27.5	24.0	32.5	24
31 - 100 MILLION	32.0	30.0	35.0	171
101 - 250 MILLION	30.0	28.0	35.0	259
251 - 500 MILLION	30.0	26.5	35.0	544
OVER 500 MILLION	26.6	24.2	28.0	4070
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	28.0	22.0	28.2	379
MIDDLE ATLANTIC	24.0	23.9	33.0	1640
EAST NORTH CENTRAL	26.5	26.4	26.6	1501
WEST NORTH CENTRAL	20.0	19.8	25.0	95
SOUTHEAST	30.0	25.0	30.1	649
WEST SOUTH CENTRAL	34.9	23.0	35.0	236
MOUNTAIN	20.0	19.8	30.0	109
PACIFIC	25.1	25.0	35.0	441
CANADA	35.2	35.0	40.0	56
RETAIL AFFILIATION				
CHAIN	26.4	23.7	30.1	4901
INDEPENDENT	30.0	25.0	35.0	205

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 116C

AVERAGE GROSS MARGIN OF SEAFOOD SECTION --FROZEN SEAFOOD

	MEDIAN	MIDDLE RANGE		N=
TOTAL	30.0	30.0	32.7	5060
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	30.0	27.0	35.0	35
10 - 30 MILLION	30.0	25.0	30.1	21
31 - 100 MILLION	30.0	29.9	33.0	165
101 - 250 MILLION	30.3	30.0	32.0	254
251 - 500 MILLION	30.0	28.0	35.0	515
OVER 500 MILLION	30.0	29.8	32.8	4070
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	32.0	27.0	32.1	370
MIDDLE ATLANTIC	30.0	29.9	32.0	1639
EAST NORTH CENTRAL	32.8	32.7	32.9	1501
WEST NORTH CENTRAL	30.1	30.0	31.0	95
SOUTHEAST	20.1	20.0	32.0	649
WEST SOUTH CENTRAL	30.0	28.0	30.1	203
MOUNTAIN	28.2	28.0	30.0	109
PACIFIC	25.4	25.0	32.0	438
CANADA	35.2	35.0	35.6	56
RETAIL AFFILIATION				
CHAIN	30.2	30.0	32.8	4874
INDEPENDENT	30.0	26.9	35.0	186

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 117A

AVERAGE LINEAR FEET OF FOOD CASES DEVOTED TO:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5398	405	1694	1519	95	867	261	48	456	53
FRESH SEAFOOD	10.4	13.8	8.1	12.2	12.8	10.7	9.2	7.8	9.2	13.8
TOTAL	5199	388	1646	1513	95	786	223	48	447	53
FROZEN SEAFOOD	28.2	8.8	28.9	26.2	17.3	56.2	14.3	12.0	10.3	40.2

TABLE 117B

AVERAGE LINEAR FEET OF FOOD CASES DEVOTED TO:

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5398	5130	268	50	54	236	326	530	4202
FRESH SEAFOOD	10.4	10.5	10.7	8.7	12.4	8.6	9.1	10.2	10.6
TOTAL	5199	4981	218	39	44	214	273	427	4202
FROZEN SEAFOOD	28.2	28.9	12.5	10.9	9.6	11.2	12.6	15.0	31.8

TABLE 118A

PERCENTAGE OF COMPANIES OFFERING SPECIAL TRAINING FOR EMPLOYEES HANDLING FRESH SEAFOOD

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5505	404	1800	1522	95	867	258	109	391	59
OFFER SPECIAL TRAINING	82.3	86.1	93.7	91.0	85.3	73.4	95.0	56.9	15.1	44.1

TABLE 118B

PERCENTAGE OF COMPANIES OFFERING SPECIAL TRAINING FOR EMPLOYEES HANDLING FRESH SEAFOOD

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5505	5231	274	53	54	239	305	591	4263
OFFER SPECIAL TRAINING	82.3	83.7	54.7	39.6	46.3	39.7	57.4	84.8	87.1

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 119A

AVERAGE NUMBER OF EMPLOYEES DEVOTED TO SEAFOOD

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5205	363	1694	1432	94	779	256	109	425	53
FULL TIME	.9	.7	1.2	1.0	.3	.6	1.6	.1	.2	.9
PART TIME	1.7	3.3	1.9	2.0	2.6	.7	1.8	.6	.4	1.0
SHARED WITH OTHER DEPARTMENTS	.6	3.0	.1	.2	5.0	1.0	.3	.5	.5	.1

TABLE 119B

AVERAGE NUMBER OF EMPLOYEES DEVOTED TO SEAFOOD

	ALL STORES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5205	4962	243	43	52	224	262	551	4073
FULL-TIME	.9	.9	.6	.3	.7	.5	.3	1.2	.9
PART TIME	1.7	1.7	.9	.7	.9	.8	.4	1.7	1.9
SHARED WITH OTHER DEPARTMENTS	.6	.5	2.1	.7	1.2	1.4	2.4	.4	.5

TABLE 120A

AVERAGE NUMBER OF SEAFOOD ITEMS CARRIED

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5398	402	1600	1513	95	713	251	109	456	59
FRESH SEAFOOD ITEMS	17.8	22.2	19.6	11.0	31.3	18.0	27.3	23.1	16.3	40.9
FROZEN SEAFOOD ITEMS	57.8	43.9	48.4	80.4	65.9	77.6	36.0	30.5	18.0	62.8
OTHER SEAFOOD ITEMS	1.6	5.3	1.4	.3	3.8	.8	.8	0	5.3	0
TOTAL SEAFOOD ITEMS	77.2	71.4	69.4	91.8	101.0	96.5	64.2	53.6	39.7	103.7

TABLE 120B

AVERAGE NUMBER OF SEAFOOD ITEMS CARRIED

	ALL STORES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5398	5133	265	55	52	220	326	591	4154
FRESH SEAFOOD ITEMS	17.8	17.7	19.2	16.3	22.5	13.1	17.8	26.6	16.7
FROZEN SEAFOOD ITEMS	57.8	59.4	28.1	14.6	17.7	26.8	18.4	36.1	66.8
OTHER SEAFOOD ITEMS	1.6	1.5	2.9	1.1	6.8	2.6	6.2	.9	1.2
TOTAL SEAFOOD ITEMS	77.2	78.6	50.3	32.0	46.9	42.5	42.4	63.6	84.7

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 121A

OPEN DATING PRACTICES USED FOR FRESH SEAFOOD ITEMS **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5467	385	1798	1517	95	786	261	109	457	59
SELL-BY DATE	62.9	70.1	88.2	24.9	97.9	59.7	80.1	44.0	84.9	-
EXPIRATION DATE	9.7	.5	7.4	2.6	-	32.8	20.3	6.4	8.3	-
PACK DATE	5.3	14.8	2.2	1.1	8.4	1.1	6.1	-	18.2	100.0
TIME/TEMPERATURE INDICATORS	1.6	.3	-	-	66.3	-	6.9	-	.9	-
BETTER IF USED BY DATE	.6	.3	-	.2	1.1	-	-	.9	.4	44.1
OTHER	22.8	14.0	1.5	71.9	-	.6	2.7	56.0	-	-
DO NOT OPEN DATE	2.7	-	2.3	1.7	1.1	5.7	11.1	-	.7	-

TABLE 121B

OPEN DATING PRACTICES USED FOR FRESH SEAFOOD ITEMS **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)				
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5467	5197	270	53	53	236	307	510	4308
SELL-BY DATE	62.9	63.6	49.6	54.7	17.0	66.9	77.2	54.1	63.4
EXPIRATION DATE	9.7	9.1	20.7	3.8	28.3	12.7	18.6	10.4	8.7
PACK DATE	5.3	4.1	27.0	37.7	17.0	15.3	24.1	15.7	1.6
TIME/TEMPERATURE INDICATORS	1.6	1.4	4.1	3.8	-	4.2	-	3.3	1.3
BETTER IF USEC BY DATE	.6	.5	3.0	9.4	5.7	-	-	-	.6
OTHER	22.8	23.7	4.1	1.9	-	4.2	8.8	14.3	26.3
DO NOT OPEN DATE	2.7	2.4	7.8	-	39.6	-	8.8	16.9	.3

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 122A

TYPES OF PREPACKAGING USED FOR FRESH SEAFOOD ITEMS **

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5471	334	1799	1508	95	860	253	109	454	59
PVC OVERWRAP ON STYROFOAM PACKAGE	97.0	83.8	99.9	98.7	95.8	100.0	84.6	100.0	89.4	100.0
THERMOFOAM	2.9	-	.1	-	-	18.1	-	-	-	-
VACUUM PACKAGES	1.6	12.0	.7	.5	-	.2	1.2	-	2.2	44.1
OTHER	25.3	16.2	5.5	73.8	4.2	-	14.2	-	11.5	44.1

TABLE 122B

TYPES OF PREPACKAGING USED FOR FRESH SEAFOOD ITEMS **

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5471	5233	238	53	44	222	296	591	4265
PVC OVERWRAP ON STYROFOAM PACKAGE	97.0	97.4	87.0	90.6	88.6	93.7	93.9	93.9	97.9
THERMOFOAM	2.9	2.8	1.3	-	6.8	-	-	-	3.6
VACUUM PACKAGES	1.8	1.3	14.7	9.4	11.4	3.6	5.7	6.8	.6
OTHER	25.3	25.9	13.0	3.8	15.9	10.4	7.1	6.1	30.4

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 123A

PERCENTAGE OF COMPANIES OFFERING PREPARED SEAFOOD DISHES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	149	20	24	27	10	19	11	5	29	4
OFFER PREPARED SEAFOOD DISHES	37.6	40.0	54.2	25.9	40.0	52.6	36.4	20.0	24.1	50.0

TABLE 123B

PERCENTAGE OF COMPANIES OFFERING PREPARED SEAFOOD DISHES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	149	69	80	35	20	28	22	20	24
OFFER PREPARED SEAFOOD DISHES	37.6	36.2	38.8	25.7	55.0	35.7	36.4	30.0	50.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 124A

SEAFOOD-RELATED SERVICES AVAILABLE TO CUSTOMERS ** -- PERCENT OF COMPANIES OFFERING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	135	18	23	24	10	15	9	5	27	4
RECIPE CARDS FOR SEAFOOD	83.7	77.8	87.0	91.7	80.0	73.3	100.0	80.0	81.5	75.0
POSTERS FOR SEAFOOD	65.9	61.1	82.6	70.8	70.0	60.0	66.7	60.0	48.1	100.0
BROCHURES ON SEAFOOD	63.7	55.6	78.3	79.2	60.0	60.0	77.8	60.0	44.4	50.0
HOLIDAY SPECIALS	60.7	66.7	78.3	66.7	50.0	66.7	55.6	20.0	48.1	50.0
IN-STORE TASTING OF SEAFOOD	51.1	50.0	56.5	70.8	30.0	53.3	55.6	60.0	40.7	-
CATCH OF THE WEEK	48.1	38.9	60.9	54.2	50.0	46.7	33.3	20.0	55.6	-
COOKING DEMONSTRATIONS WITH SEAFOOD	28.9	27.8	34.8	29.2	10.0	33.3	33.3	20.0	29.6	25.0
FISH WEEK	22.2	11.1	21.7	16.7	20.0	26.7	22.2	40.0	22.2	75.0

TABLE 124B

SEAFOOD-RELATED SERVICES AVAILABLE TO CUSTOMERS ** -- PERCENT OF COMPANIES OFFERING

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	135	64	71	27	20	26	20	19	23
RECIPE CARDS FOR SEAFOOD	83.7	89.1	78.9	70.4	80.0	76.9	95.0	94.7	91.3
POSTERS FOR SEAFOOD	65.9	73.4	59.2	59.3	65.0	65.4	65.0	84.2	60.9
BROCHURES ON SEAFOOD	63.7	68.8	59.2	44.4	65.0	61.5	70.0	68.4	78.3
HOLIDAY SPECIALS	60.7	62.5	59.2	51.9	80.0	46.2	60.0	63.2	69.6
IN-STORE TASTING OF SEAFOOD	51.1	56.3	46.5	29.6	60.0	42.3	60.0	63.2	60.9
CATCH OF THE WEEK	48.1	51.6	45.1	40.7	45.0	53.8	35.0	47.4	65.2
COOKING DEMONSTRATIONS WITH SEAFOOD	28.9	35.9	22.5	14.8	25.0	26.9	25.0	47.4	39.1
FISH WEEK	22.2	23.4	21.1	22.2	25.0	15.4	30.0	26.3	17.4

** MULTIPLE RESPONSES ACCEPTED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 125A

TYPES OF ADVERTISING USED TO PROMOTE SEAFOOD PRODUCTS **

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5571	405	1799	1522	95	867	261	109	454	59
NEWSPAPER	92.5	64.7	99.5	98.5	89.5	87.7	92.7	37.6	97.1	55.9
IN-STORE ADVERTISING	90.8	67.4	99.1	94.7	83.2	79.5	95.0	57.8	93.6	100.0
MAILER/FLYER	68.0	95.6	65.8	89.5	11.6	33.6	67.8	-	72.7	84.7
COUPONS	30.9	40.2	4.3	83.4	60.0	8.5	-	56.0	5.1	-
RADIO	30.6	25.7	5.1	74.0	71.6	16.0	8.4	35.8	20.0	40.7
TELEVISION	30.5	40.0	5.1	76.5	14.7	16.0	-	35.8	14.5	40.7
OTHER	2.0	.7	5.9	-	-	-	-	-	.9	-
NO ADVERTISING DONE	.5	.7	-	.8	-	.7	-	6.4	-	-

TABLE 125B

TYPES OF ADVERTISING USED TO PROMOTE SEAFOOD PRODUCTS **

	ALL STORES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5571	5297	274	53	54	239	326	591	4308
NEWSPAPER	92.5	93.6	71.2	62.3	70.4	81.6	88.0	88.8	94.6
IN-STORE ADVERTISING	90.8	91.7	73.7	69.8	77.8	72.0	78.5	96.6	92.4
MAILER/FLYER	68.0	69.4	42.0	41.5	35.2	33.5	48.2	60.4	73.3
COUPONS	30.9	31.9	12.8	5.7	13.0	17.2	14.1	22.8	34.6
RADIO	30.6	31.7	9.5	7.5	7.4	16.7	36.5	13.7	33.8
TELEVISION	30.5	32.1	.7	-	3.7	-	21.2	6.1	37.0
OTHER	2.0	2.0	2.6	-	5.6	1.7	-	-	2.5
NO ADVERTISING DONE	.5	.3	4.0	7.5	-	-	2.1	.8	.3

** MULTIPLE RESPONSES ACCEPTED

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 126A

USE OF SCANNERS WITH FRESH SEAFOOD PRODUCTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	4862	342	1764	1495	94	532	134	47	395	59
HAVE SCANNERS, BUT DO NOT SCAN FRESH SEAFOOD	20.0	6.7	37.2	7.8	12.8	1.7	21.6	14.9	23.8	44.1
SCAN FRESH SEAFOOD	80.0	93.3	62.8	92.2	87.2	98.3	78.4	85.1	76.2	55.9
% OF PRODUCTS	48.4	87.9	10.9	38.4	91.5	88.2	95.6	100.0	81.3	99.8

TABLE 126B

USE OF SCANNERS WITH FRESH SEAFOOD PRODUCTS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	4862	4678	184	28	28	165	244	462	3935
HAVE SCANNERS, BUT DO NOT SCAN FRESH SEAFOOD	20.0	19.4	36.4	35.7	25.0	51.5	38.9	24.5	16.9
SCAN FRESH SEAFOOD	80.0	80.6	63.6	64.3	75.0	48.5	61.1	75.5	83.1
% OF PRODUCTS	48.4	47.4	85.5	98.3	79.2	79.9	80.8	72.0	43.3

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 127A

PERCENTAGE OF COMPANIES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	339	22	35	94	27	60	24	17	50	10
PERCENT WITH ATM	21.2	22.7	22.9	26.6	25.9	16.7	20.8	11.8	16.0	20.0
TOTAL	321	20	36	86	24	59	24	16	46	10
PERCENT WITH NON-ATM ELECTRONIC DEVICES	11.8	35.0	25.0	8.1	16.7	5.1	20.8	-	6.5	-
TOTAL	315	19	33	85	24	58	24	16	46	10
PERCENT WITH EFT-POS	2.5	-	3.0	2.4	8.3	1.7	4.2	-	2.2	-

TABLE 127B

PERCENTAGE OF COMPANIES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

	ALL COMPANIES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	339	106	233	124	61	56	33	26	39
PERCENT WITH ATM	21.2	43.4	11.2	5.6	9.8	19.6	33.3	38.5	69.2
TOTAL	321	104	217	115	60	51	32	24	39
PERCENT WITH NON-ATM ELECTRONIC DEVICES	11.8	19.2	8.3	10.4	5.0	7.8	12.5	4.2	35.9
TOTAL	315	104	211	111	59	50	31	25	39
PERCENT WITH EFT-POS	2.5	7.7	-	-	-	-	3.2	4.0	15.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 128A

PERCENTAGE OF STORES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	13,350	312	738	2,853	419	2,954	511	685	3,140	1,738
PERCENT WITH ATM	15.1	15.1	22.8	8.4	21.0	24.0	17.6	10.2	18.9	.2
TOTAL	13,249	310	739	2,807	408	2,953	511	665	3,118	1,738
PERCENT WITH NON-ATM ELECTRONIC DEVICES	5.3	32.9	29.4	9.0	7.1	.1	14.9	-	.9	-
TOTAL	13,217	309	736	2,820	408	2,912	511	665	3,118	1,738
PERCENT WITH EFT-POS	.3	-	.5	.1	7.8	-	.2	-	.1	-

TABLE 128B

PERCENTAGE OF STORES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	13,350	12,679	671	155	180	528	1,116	1,242	10,129
PERCENT WITH ATM	15.1	15.5	7.2	4.5	3.3	4.5	4.0	9.7	17.8
TOTAL	13,249	12,636	613	144	179	488	1,110	1,199	10,129
PERCENT WITH NON-ATM ELECTRONIC DEVICES	5.3	5.4	4.2	8.3	2.8	2.9	8.5	.4	5.7
TOTAL	13,217	12,618	599	140	178	479	1,069	1,222	10,129
PERCENT WITH EFT-POS	.3	.3	-	-	-	-	1.1	.2	.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 129

TYPICAL NUMBER OF ATM TRANSACTIONS PER WEEK PER MACHINE

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	1500.0	500.0	4000.0	1284
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION				3
10 - 30 MILLION				3
31 - 100 MILLION	410.0	400.0	589.0	6
101 - 250 MILLION	571.0	480.0	2500.0	39
251 - 500 MILLION	180.0	175.0	1000.0	84
OVER 500 MILLION	3000.0	505.0	4010.0	1149
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	1200.0	571.0	1205.0	42
MIDDLE ATLANTIC	810.0	800.0	1522.0	97
EAST NORTH CENTRAL	4000.0	3600.0	4020.0	200
WEST NORTH CENTRAL	750.0	745.0	752.0	85
SOUTHEAST	500.0	250.0	5000.0	654
WEST SOUTH CENTRAL	3406.0	3000.0	3410.0	68
MOUNTAIN	1007.0	1000.0	1012.0	50
PACIFIC	3000.0	2700.0	3300.0	84
CANADA	1750.0	1500.0	2000.0	4
RETAIL AFFILIATION				
CHAIN	1522.0	510.0	4015.0	1262
INDEPENDENT	571.0	400.0	574.0	22

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH ATMS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 130A

OWNERS OF AUTOMATIC TELLER MACHINES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL MACHINES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1983	17	148	237	90	743	69	85	590	4
THIRD PARTY SERVICE/PROVIDER	37.4	-	25.7	-	-	33.5	-	47.1	70.3	-
BANK	34.2	100.0	45.9	96.6	92.2	12.1	11.6	11.8	28.6	100.0
SUPERMARKET COMPANY	19.0	-	28.4	-	7.8	42.3	18.8	-	-	-
OTHER FINANCIAL INSTITUTION	2.1	-	-	.4	-	-	-	41.2	1.0	-
OTHER	7.3	-	-	3.0	-	12.1	69.6	-	-	-

TABLE 130B

OWNERS OF AUTOMATIC TELLER MACHINES

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL MACHINES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1983	1940	43	5	5	24	45	129	1775
THIRD PARTY SERVICE/PROVIDER	37.4	38.0	11.6	-	-	20.8	-	45.0	38.3
BANK	34.2	33.0	86.0	100.0	80.0	79.2	84.4	26.4	32.6
SUPERMARKET COMPANY	19.0	19.4	-	-	-	-	-	1.6	21.1
OTHER FINANCIAL INSTITUTION	2.1	2.1	2.3	-	20.0	-	-	27.1	.3
OTHER	7.3	7.5	-	-	-	-	15.6	-	7.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 131A

TYPE OF COMPENSATION FOR NON-SUPERMARKET OWNED ATM EQUIPMENT

	ALL MACHINES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1828	17	149	233	90	673	90	50	522	4
SPACE & TRANSACTION FEE	44.6	82.4	45.0	74.7	-	-	11.1	100.0	95.8	-
TRANSACTION FEE	43.9	17.6	54.4	5.2	26.7	90.5	75.6	-	1.0	-
SPACE RENTAL	3.8	-	.7	17.6	-	.3	10.0	-	2.5	100.0
OTHER	7.7	-	-	2.6	73.3	9.2	3.3	-	.8	-

TABLE 131B

TYPE OF COMPENSATION FOR NON-SUPERMARKET OWNED ATM EQUIPMENT

	ALL MACHINES	RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1828	1782	46	5	6	24	47	94	1652
SPACE & TRANSACTION FEE	44.6	45.2	21.7	-	-	-	21.3	-	48.7
TRANSACTION FEE	43.9	43.9	41.3	60.0	50.0	45.8	48.9	63.8	42.5
SPACE RENTAL	3.8	3.1	30.4	20.0	50.0	33.3	17.0	23.4	1.7
OTHER	7.7	7.7	6.5	20.0	-	20.8	12.8	12.8	7.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 132A

MIXTURE OF ATM TRANSACTIONS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL MACHINES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1157	11	147	31	89	237	21	50	571	0
CASH DISPENSING	77.1	80.0	72.2	73.9	67.3	74.2	84.5	80.0	80.6	
BALANCE INQUIRY	17.6	5.5	20.1	11.7	12.2	24.9	9.5	5.0	16.6	
DEPOSIT TAKING	3.2	9.1	5.4	12.2	18.0	.5	.7	15.0	0	
ACCOUNT/BALANCE TRANSFER	2.0	5.5	2.3	1.8	2.5	.1	4.8	0	2.7	
OTHER	.1	0	.3		0	.4	.5	0	0	

TABLE 132B

MIXTURE OF ATM TRANSACTIONS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL MACHINES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1157	1130	27	2	2	13	37	74	1029
CASH DISPENSING	77.1	77.1	74.3			70.8	66.3	68.4	78.2
BALANCE INQUIRY	17.6	17.8	6.2			5.9	15.4	29.6	16.9
DEPOSIT TAKING	3.2	3.0	11.7			13.4	14.2	1.6	2.8
ACCOUNT/BALANCE TRANSFER	2.0	2.0	4.3			2.7	3.9	.3	2.1
OTHER	.1	.1	3.5			7.2	.2	.1	0

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF ATM MACHINES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 133A

RATING ATM OPERATION
1 INDICATING POOR AND 5 INDICATING EXCELLENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	64	4	6	22	6	9	5	2	8	2
CUSTOMER CONVENIENCE	4.1	4.3	3.8	4.2	3.5	4.3	4.2		4.3	
EASE OF USE	4.0	4.3	4.3	4.0	3.7	4.0	4.4		4.0	
OVERALL PERFORMANCE	4.0	4.3	3.5	4.0	4.2	4.2	3.8		3.8	
HARDWARE RELIABILITY	3.9	4.5	3.8	3.9	3.5	4.1	3.6		3.6	
MAINTENANCE	3.8	4.3	3.3	4.1	4.0	4.0	3.6		3.0	
CUSTOMER ACCEPTANCE	3.6	3.3	3.0	3.8	4.0	4.0	3.0		3.1	
CUSTOMER USAGE	3.2	3.3	2.5	3.5	3.2	3.4	2.6		2.9	
STORE SAVINGS	2.8	2.8	3.0	3.1	2.7	3.1	2.0		2.4	

TABLE 133B

RATING ATM OPERATION
1 INDICATING POOR AND 5 INDICATING EXCELLENT

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	64	40	24	6	5	11	11	9	22
CUSTOMER CONVENIENCE	4.1	4.2	4.1	3.8	4.0	4.1	4.4	4.3	4.0
EASE OF USE	4.0	4.1	4.0	4.0	4.0	3.8	4.0	4.1	4.2
OVERALL PERFORMANCE	4.0	4.0	4.0	4.2	3.6	4.0	4.0	4.4	3.9
HARDWARE RELIABILITY	3.9	3.9	3.8	3.8	3.4	3.9	3.7	4.2	3.9
MAINTENANCE	3.8	3.7	4.0	4.3	3.8	3.9	3.8	3.9	3.7
CUSTOMER ACCEPTANCE	3.6	3.6	3.6	3.8	3.6	3.6	3.7	4.1	3.2
CUSTOMER USAGE	3.2	3.2	3.2	2.8	3.4	3.3	3.5	3.7	2.9
STORE SAVINGS	2.8	2.7	2.9	2.8	3.0	2.8	3.3	3.1	2.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 134A

EFFECT OF ATM ON CHECK VOLUME AT CHECKOUT

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	55	3	5	21	4	6	5	1	8	2
CHECK VOLUME DECREASED	18.2		40.0	19.0	-	16.7	20.0		12.5	
CHECK VOLUME REMAINED THE SAME	80.0		60.0	81.0	100.0	83.3	60.0		87.5	
CHECK VOLUME INCREASED	1.8		-	-	-	-	20.0		-	

TABLE 134B

EFFECT OF ATM ON CHECK VOLUME AT CHECKOUT

	ALL COMPANIES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	55	35	20	6	4	8	11	6	20
CHECK VOLUME DECREASED	18.2	17.1	20.0	-	25.0	25.0	27.3	-	20.0
CHECK VOLUME REMAINED THE SAME	80.0	80.0	80.0	100.0	75.0	75.0	72.7	100.0	75.0
CHECK VOLUME INCREASED	1.8	2.9	-	-	-	-	-	-	5.0

TABLE 135A

EFFECT OF ATM ON CASH VOLUME AT CHECKOUT

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	53	3	4	21	3	6	4	2	8	2
CASH VOLUME DECREASED	9.4		-	4.8		16.7	25.0		12.5	
CASH VOLUME REMAINED THE SAME	67.9		50.0	76.2		83.3	-		75.0	
CASH VOLUME INCREASED	22.6		50.0	19.0		-	75.0		12.5	

TABLE 135B

EFFECT OF ATM ON CASH VOLUME AT CHECKOUT

	ALL COMPANIES	RETAIL AFFIL. CHAIN	INDE-PENDENT	1984 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	53	34	19	5	4	8	11	6	19
CASH VOLUME DECREASED	9.4	11.8	5.3	20.0	-	-	-	-	21.1
CASH VOLUME REMAINED THE SAME	67.9	67.6	68.4	60.0	75.0	75.0	72.7	100.0	52.6
CASH VOLUME INCREASED	22.6	20.6	26.3	20.0	25.0	25.0	27.3	-	26.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 136A

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT TWO YEARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ATM										
TOTAL RESPONDING	230	14	22	61	16	44	18	12	36	7
WILL INSTALL	30.0	14.3	54.5	29.5	25.0	25.0	22.2	8.3	36.1	57.1
WILL NOT INSTALL	70.0	85.7	45.5	70.5	75.0	75.0	77.8	91.7	63.9	42.9
NON-ATM ELECTRONIC FINANCIAL SERVICE										
TOTAL RESPONDING	216	12	17	63	14	42	18	11	32	9
WILL INSTALL	7.3	-	5.9	3.2	14.3	9.5	-	-	15.6	22.2
WILL NOT INSTALL	92.7	100.0	94.1	96.8	85.7	90.5	100.0	100.0	84.4	77.8
EFT-POS SYSTEM										
TOTAL RESPONDING	256	18	27	72	17	44	20	12	37	9
WILL INSTALL	23.0	16.7	22.2	26.4	17.6	25.0	5.0	25.0	29.7	22.2
WILL NOT INSTALL	77.0	83.3	77.8	73.6	82.4	75.0	95.0	75.0	70.3	77.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 136B

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT TWO YEARS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
ATM									
TOTAL RESPONDING	230	52	178	98	48	41	22	13	8
WILL INSTALL	30.0	36.5	28.1	17.3	43.8	39.0	27.3	38.5	50.0
WILL NOT INSTALL	70.0	63.5	71.9	82.7	56.3	61.0	72.7	61.5	50.0
NON-ATM ELECTRONIC FINANCIAL SERVICE									
TOTAL RESPONDING	218	69	149	82	38	36	24	16	22
WILL INSTALL	7.3	8.7	6.7	7.3	5.3	5.6		6.3	22.7
WILL NOT INSTALL	92.7	91.3	93.3	92.7	94.7	94.4	100.0	93.8	77.3
EFT-POS SYSTEM									
TOTAL RESPONDING	256	88	168	87	47	41	29	20	32
WILL INSTALL	23.0	38.6	14.9	9.2	17.0	14.6	31.0	50.0	56.3
WILL NOT INSTALL	77.0	61.4	85.1	90.8	83.0	85.4	69.0	50.0	43.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 137A

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT FIVE YEARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ATM										
TOTAL RESPONDING	177	15	19	50	12	30	13	10	23	5
WILL INSTALL	47.5	46.7	68.4	44.0	25.0	26.7	38.5	60.0	69.6	80.0
WILL NOT INSTALL	52.5	53.3	31.6	56.0	75.0	73.3	61.5	40.0	30.4	20.0
NON-ATM ELECTRONIC FINANCIAL SERVICE										
TOTAL RESPONDING	176	10	15	56	12	31	13	10	23	6
WILL INSTALL	14.8	10.0	13.3	14.3	8.3	19.4	-	-	26.1	33.3
WILL NOT INSTALL	85.2	90.0	86.7	85.7	91.7	80.6	100.0	100.0	73.9	66.7
EFT-POS SYSTEM										
TOTAL RESPONDING	227	15	26	67	15	37	18	11	31	7
WILL INSTALL	47.1	40.0	57.7	50.7	33.3	35.1	27.8	45.5	61.3	71.4
WILL NOT INSTALL	52.9	60.0	42.3	49.3	66.7	64.9	72.2	54.5	38.7	28.6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 137B

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL SYSTEM WITHIN THE NEXT FIVE YEARS

		RETAIL AFFIL.		1984 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
ATM									
TOTAL RESPONDING	177	44	133	76	35	30	19	10	7
WILL INSTALL	47.5	59.1	43.6	32.9	57.1	60.0	42.1	60.0	100.0
WILL NOT INSTALL	52.5	40.9	56.4	67.1	42.9	40.0	57.9	40.0	-
NON-ATM ELECTRONIC FINANCIAL SERVICE									
TOTAL RESPONDING	176	59	117	63	34	26	22	12	19
WILL INSTALL	14.8	25.4	9.4	11.1	5.9	11.5	13.6	33.3	36.8
WILL NOT INSTALL	85.2	74.6	90.6	88.9	94.1	88.5	86.4	66.7	63.2
EFT-POS SYSTEM									
TOTAL RESPONDING	227	77	150	81	38	38	27	17	26
WILL INSTALL	47.1	66.2	37.3	29.6	36.8	57.9	48.1	76.5	80.8
WILL NOT INSTALL	52.9	33.8	62.7	70.4	63.2	42.1	51.9	23.5	19.2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1985

TABLE 138

OPERATING RESULTS

(Current & Historical)

	1976	1977	1978	1979	1980	1981	1982	1983	1984
Profit									
Gross Profit with Warehouse	22.2%	22.0%	22.6%	22.3%	22.4%	23.0%	23.4%	23.7%	24.1%
Gross Profit without Warehouse	20.0	19.7	21.0	20.5	20.9	20.9	21.2	21.5	21.6
Store Door Margin	18.6	18.5	18.9	18.9	18.7	18.8	19.2	19.4	20.2
Net Profit (before taxes)	1.3	1.4	1.7	1.9	1.5	1.4	1.5	1.0	1.6
Expenses									
Store Labor	8.3	8.4	8.5	8.3	8.4	8.5	8.8	8.8	8.9
Fringe Benefits	1.5	1.7	2.0	1.8	1.9	2.0	2.1	2.2	2.3
Store Supply	0.9	0.9	0.9	0.9	1.0	0.9	0.9	0.9	0.9
Rent and Real Estate	1.3	1.3	1.3	1.2	1.3	1.3	1.4	1.4	1.3
Utilities	0.9	0.9	1.0	1.0	1.0	1.1	1.2	1.2	1.2

Source: Operations Review 1976-1984

TABLE 139

PERCENT OF DISPOSABLE INCOME SPENT ON FOOD

	All Food	Food at Home	Food Away from Home
1984	15.1%	10.8%	4.3%
1983	15.6	11.2	4.4
1982	16.0	11.6	4.4
1981	16.0	11.8	4.2
1980	16.5	12.1	4.3
1979	16.5	12.1	4.4
1978	16.3	12.0	4.3
1977	16.5	12.2	4.3
1976	16.8	12.5	4.3

Source: U.S. Department of Agriculture
Economics, Statistics & Cooperatives Service

TABLE 140

CONSUMER PRICE INDEX*

Annual Average

	ALL ITEMS		FOOD AT HOME		FOOD AWAY FROM HOME	
	C.P.I.	Percent Change	C.P.I.	Percent Change	C.P.I.	Percent Change
1984	311.1	4.3	292.6	3.7	333.4	4.2
1983	298.4	3.2	282.2	1.1	319.9	4.4
1982	289.1	6.1	279.2	3.4	306.5	5.3
1981	272.4	10.4	269.9	7.3	291.0	9.0
1980	246.8	13.5	251.5	8.0	267.0	9.9
1979	217.4	11.3	232.9	10.8	242.9	11.2
1978	195.4	7.7	210.2	10.5	218.4	9.0
1977	181.5	6.5	190.2	6.0	200.3	7.5
1976	170.5	5.8	179.5	2.1	186.4	7.0

* 1967 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 141

HISTORICAL DATA

Average Percent Change in Retail Sales	
1983 vs. 1984	7.3%
1982 vs. 1983	7.6
1981 vs. 1982	8.7
1980 vs. 1981	9.3
1979 vs. 1980	14.1
1978 vs. 1979	15.0
1977 vs. 1978	13.1
1976 vs. 1977	9.5
1975 vs. 1976	8.7

Average Percent Change in Retail Sales-Identical Stores	
1983 vs. 1984	5.6%
1982 vs. 1983	6.1
1981 vs. 1982	7.7
1980 vs. 1981	8.1
1979 vs. 1980	11.4
1978 vs. 1979	11.7
1977 vs. 1978	11.8
1976 vs. 1977	8.0
1975 vs. 1976	6.7

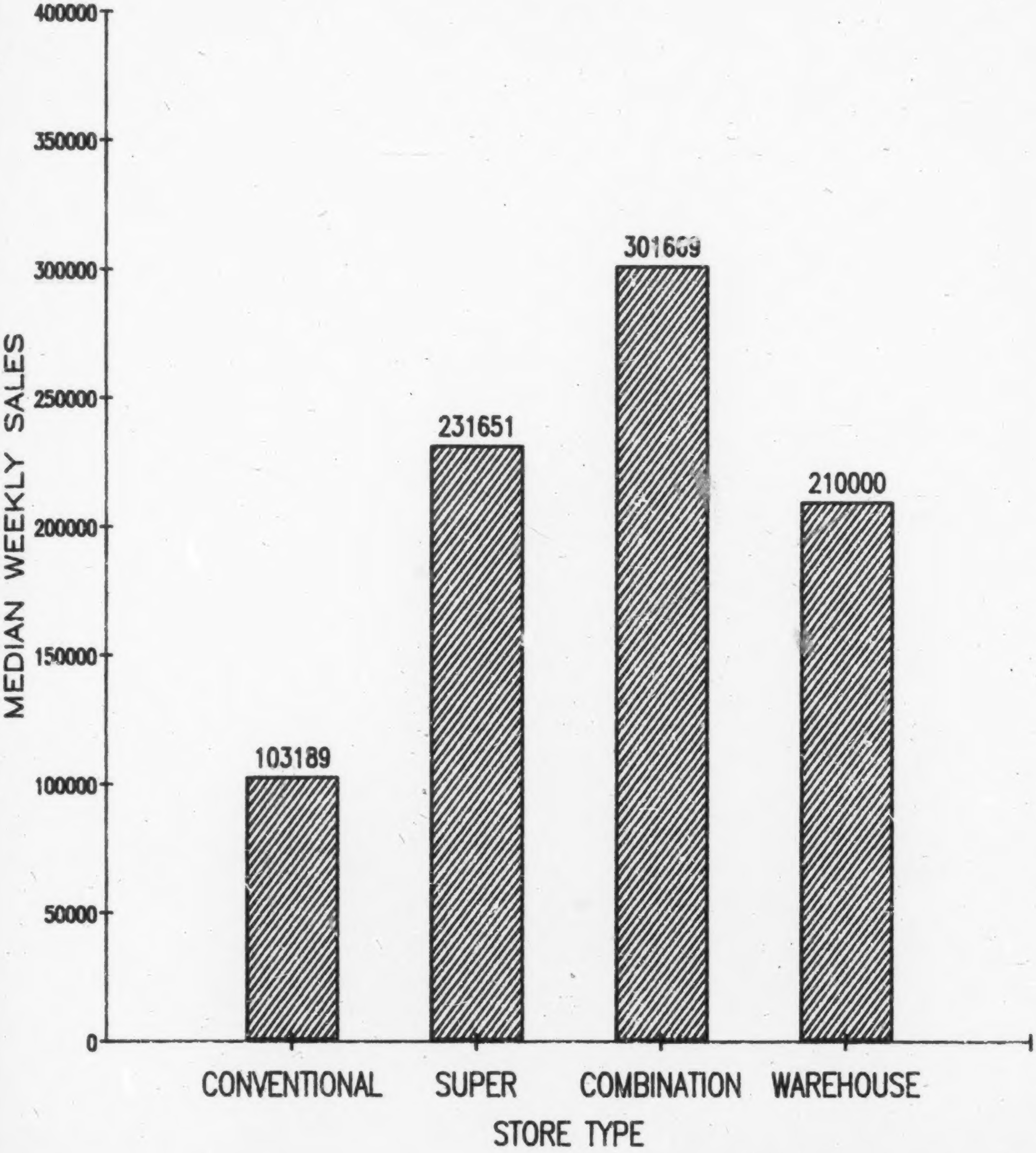
Average Weekly Store Sales	
1984	$175,900
1983	153,600
1982	180,500
1981	159,000
1980	110,000
1979	110,000
1978	88,337
1977	75,000
1976	72,425

Average Weekly Sales Per Square Foot	
1984	$8.00
1983	6.95
1982	7.90
1981	6.75
1980	6.94
1979	6.49
1978	6.17
1977	5.80
1976	5.50

Average Sales Per Transaction	
1984	$15.36
1983	14.60
1982	14.33
1981	14.23
1980	12.10
1979	11.60
1978	10.28
1977	9.85
1976	9.39

Average Number of Items in a Supermarket	
1984	15,379
1983	16,719
1982	13,067
1981	12,877
1980	14,145
1979	12,745
1978	11,767
1976	9,000
1974	9,000

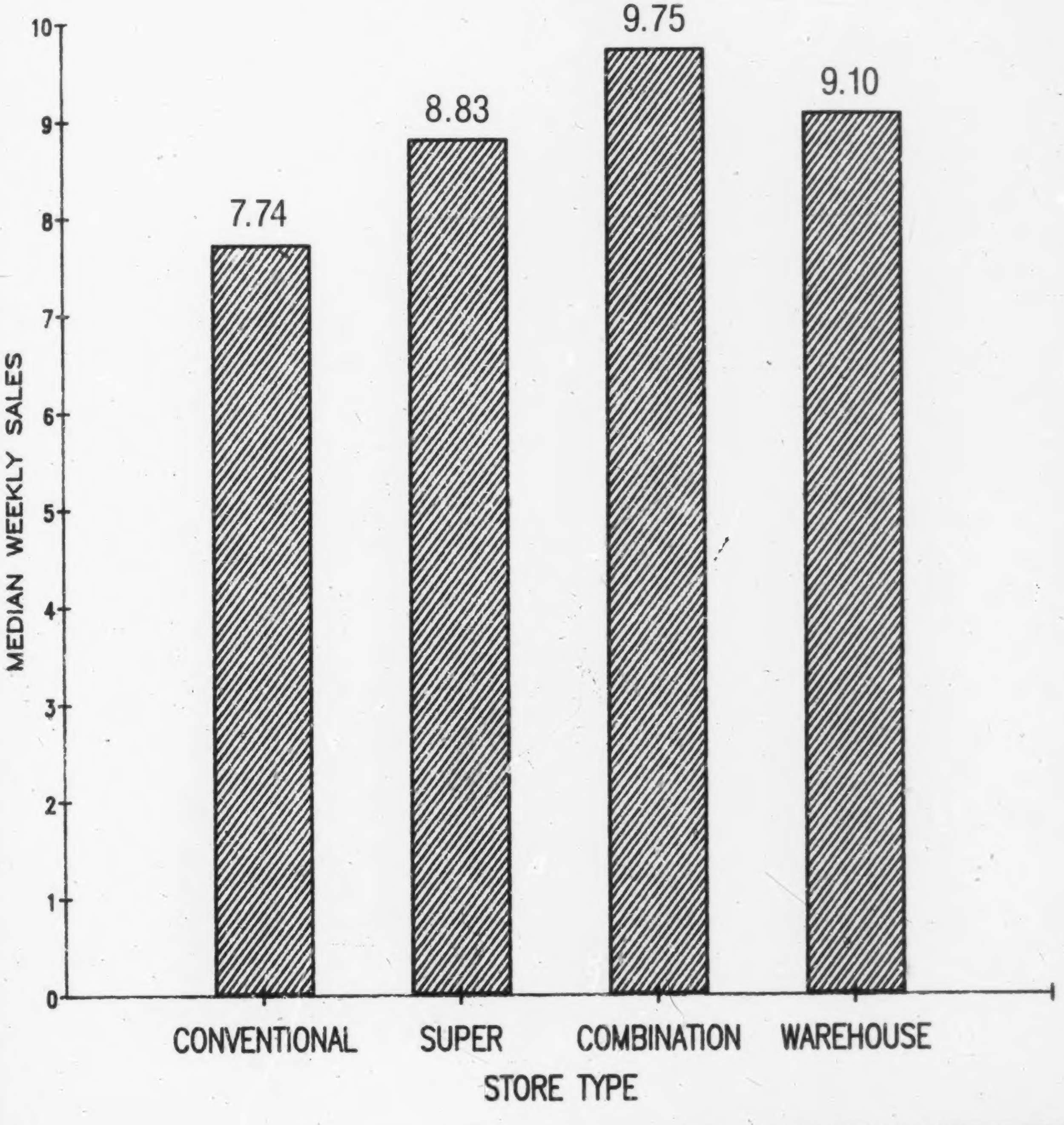
GRAPH 1
TYPICAL WEEKLY SALES PER SUPERMARKET IN 1984
(IN DOLLARS)



NOTE: DATA WEIGHTED BY NUMBER OF STORES

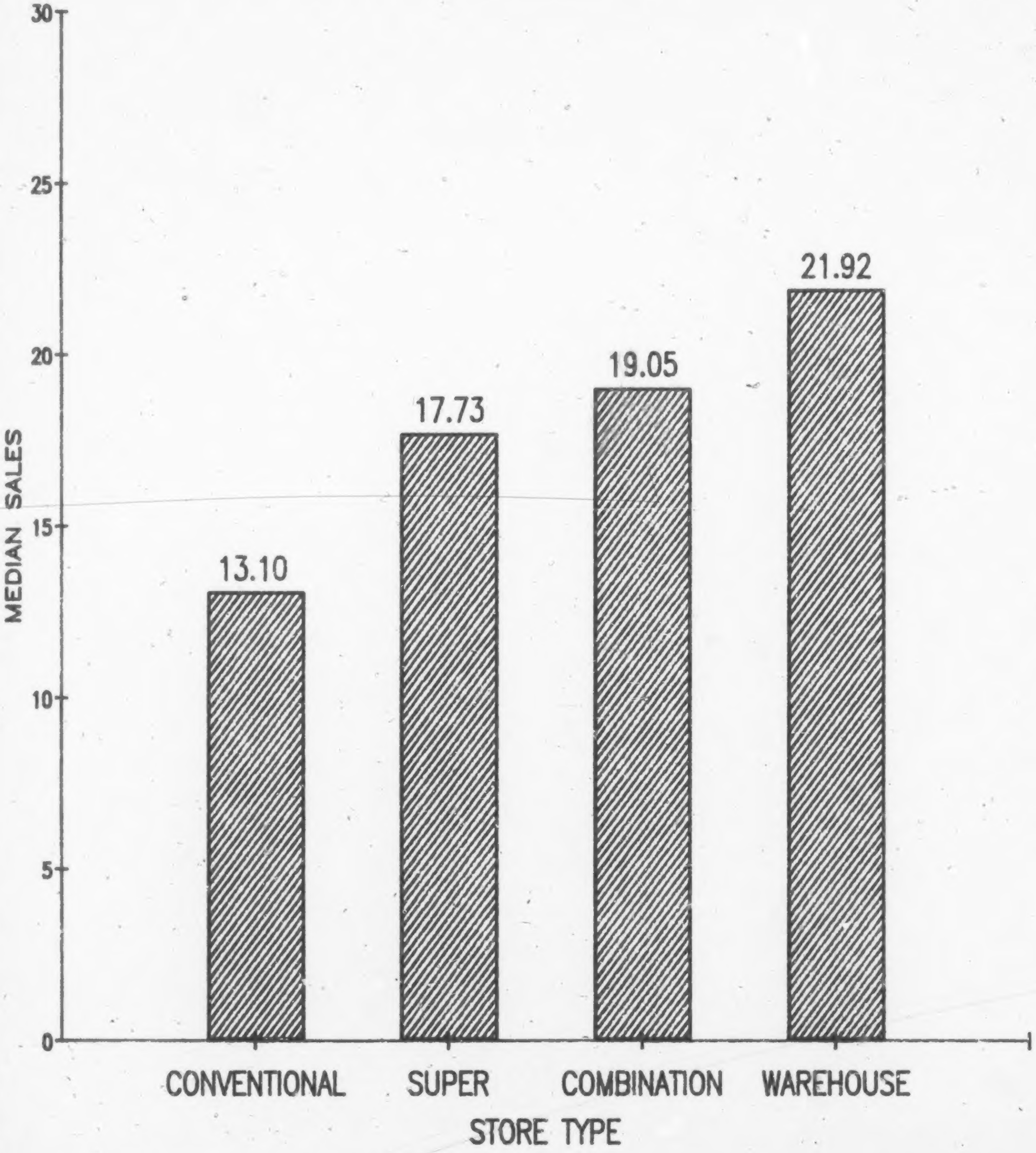
GRAPH 2

TYPICAL WEEKLY SALES PER SQUARE FOOT OF SELLING AREA (IN DOLLARS)



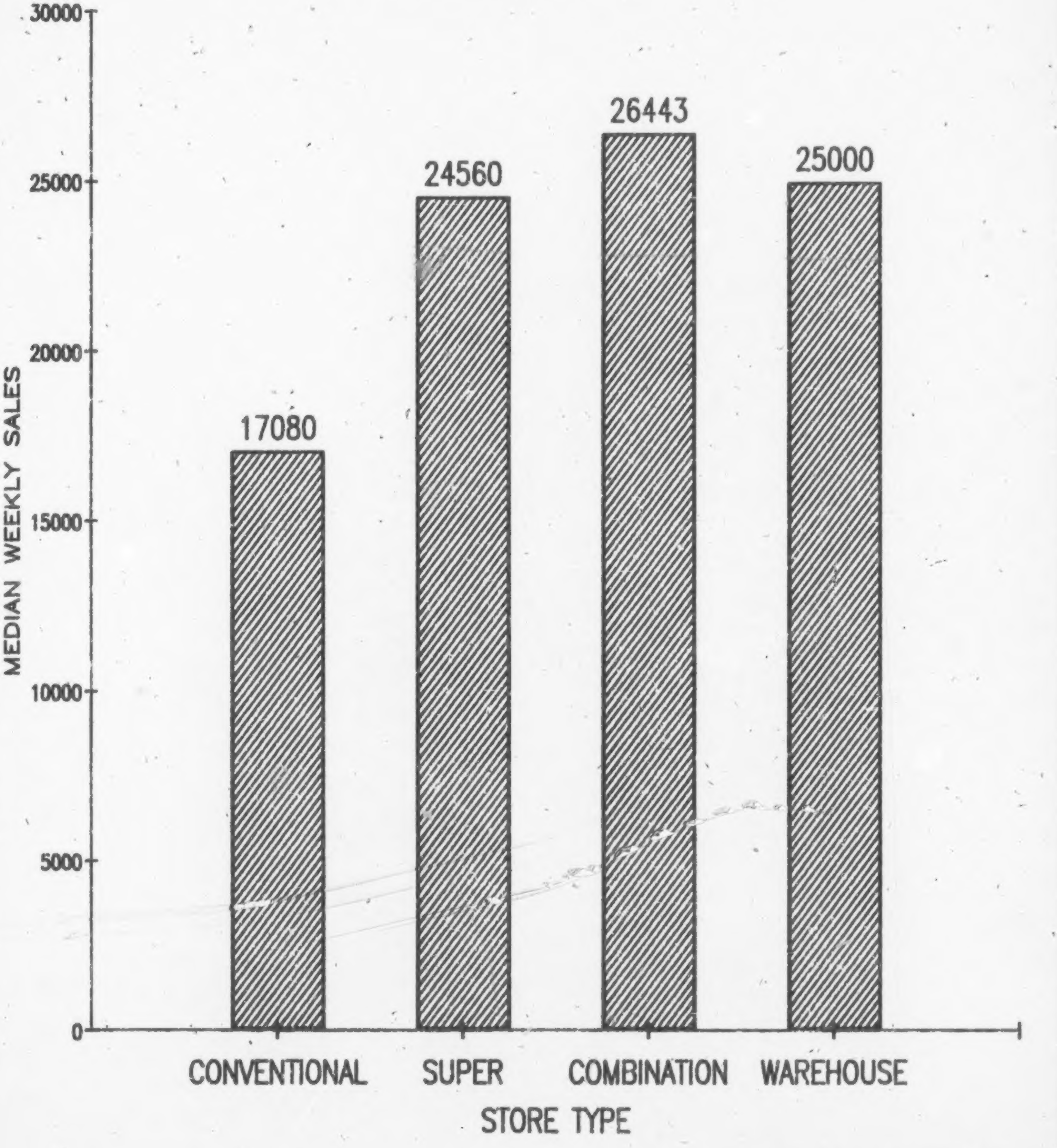
NOTE: DATA WEIGHTED BY NUMBER OF STORES

GRAPH 3
TYPICAL SALE PER CUSTOMER TRANSACTION (IN DOLLARS)



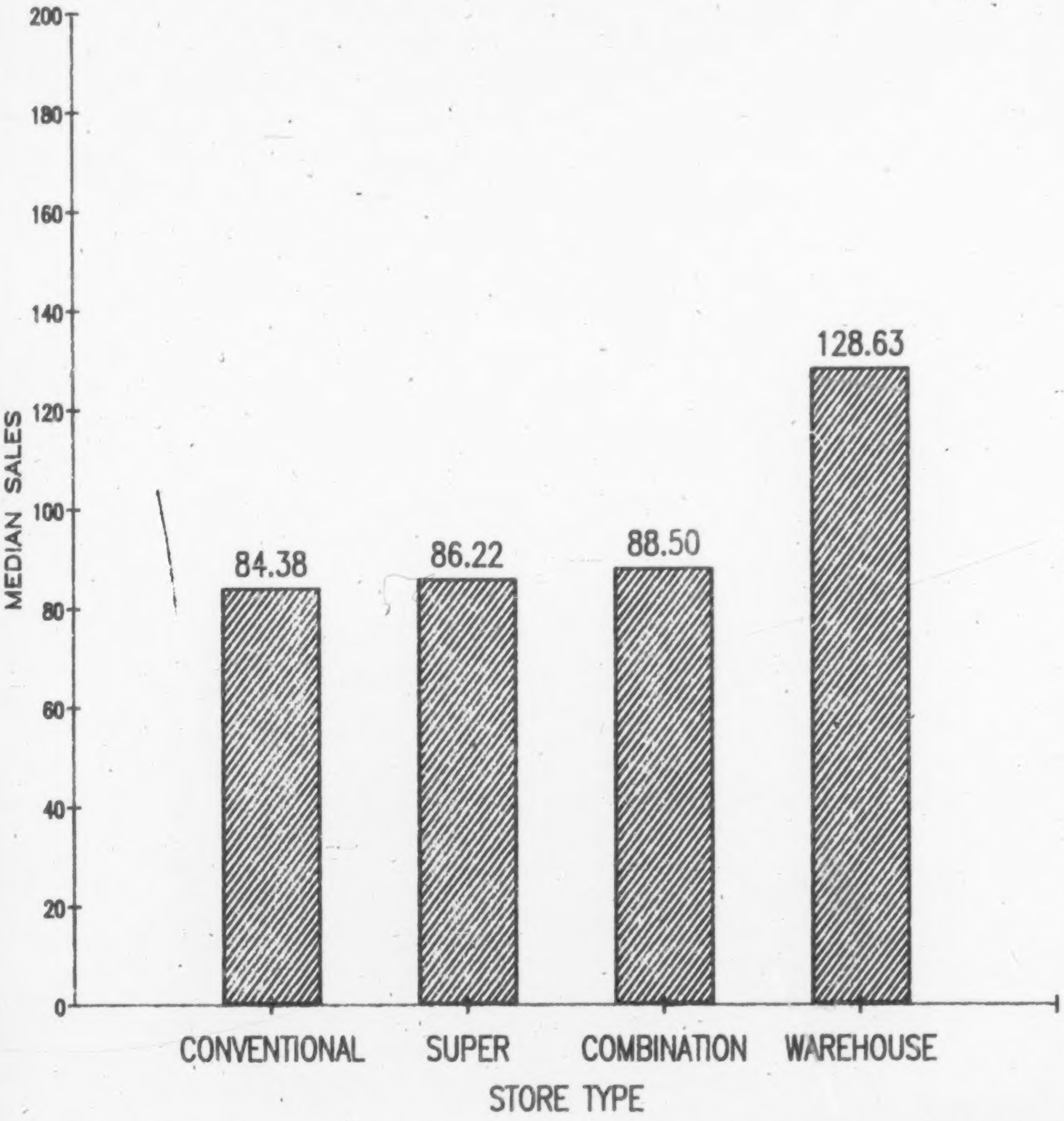
NOTE: DATA WEIGHTED BY NUMBER OF STORES

GRAPH 4
TYPICAL WEEKLY SALES PER CHECKOUT
(IN DOLLARS)



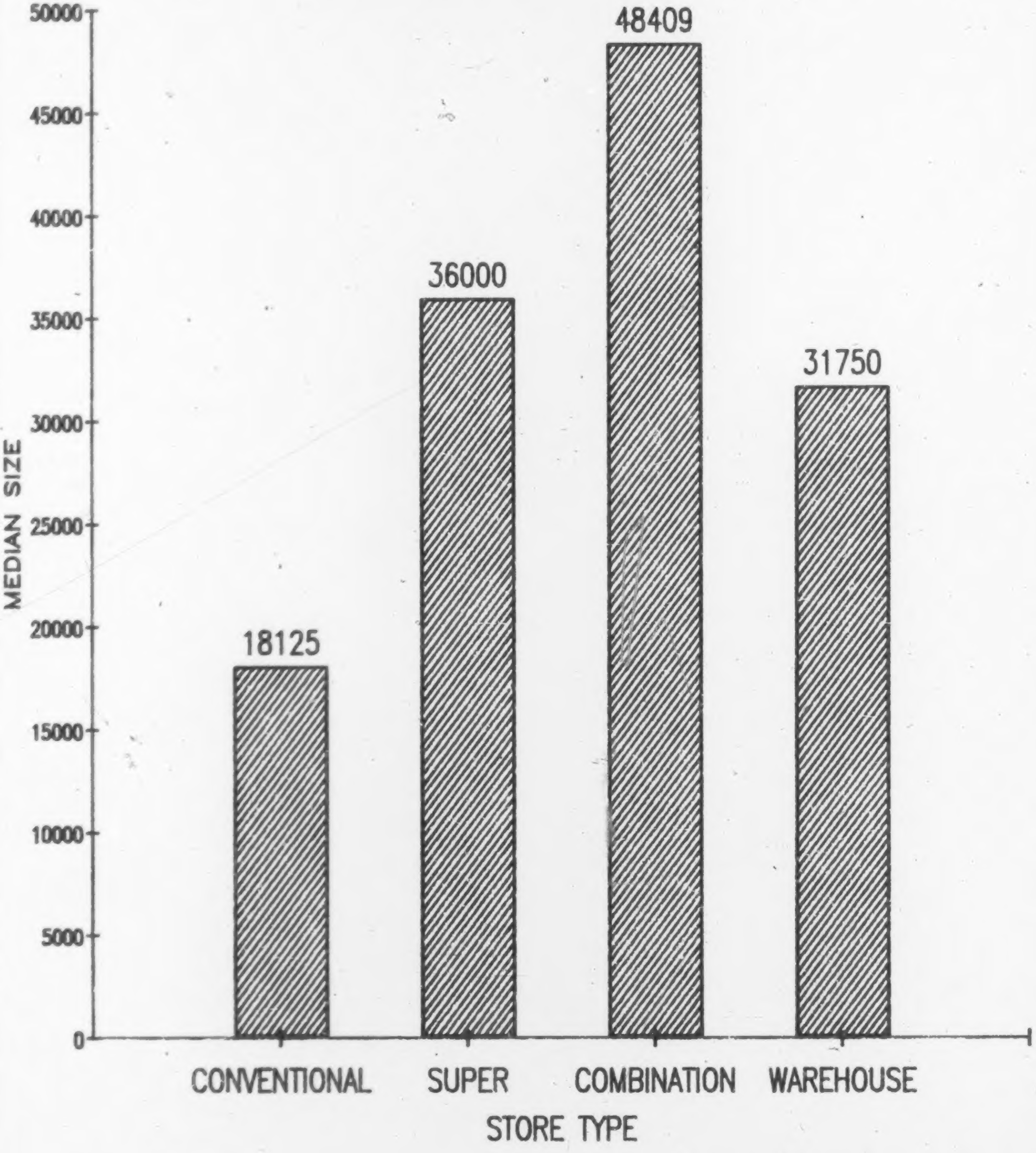
NOTE: DATA WEIGHTED BY NUMBER OF STORES

GRAPH 5
TYPICAL SALES PER LABOR HOUR FOR STORE EMPLOYEES
(IN DOLLARS)



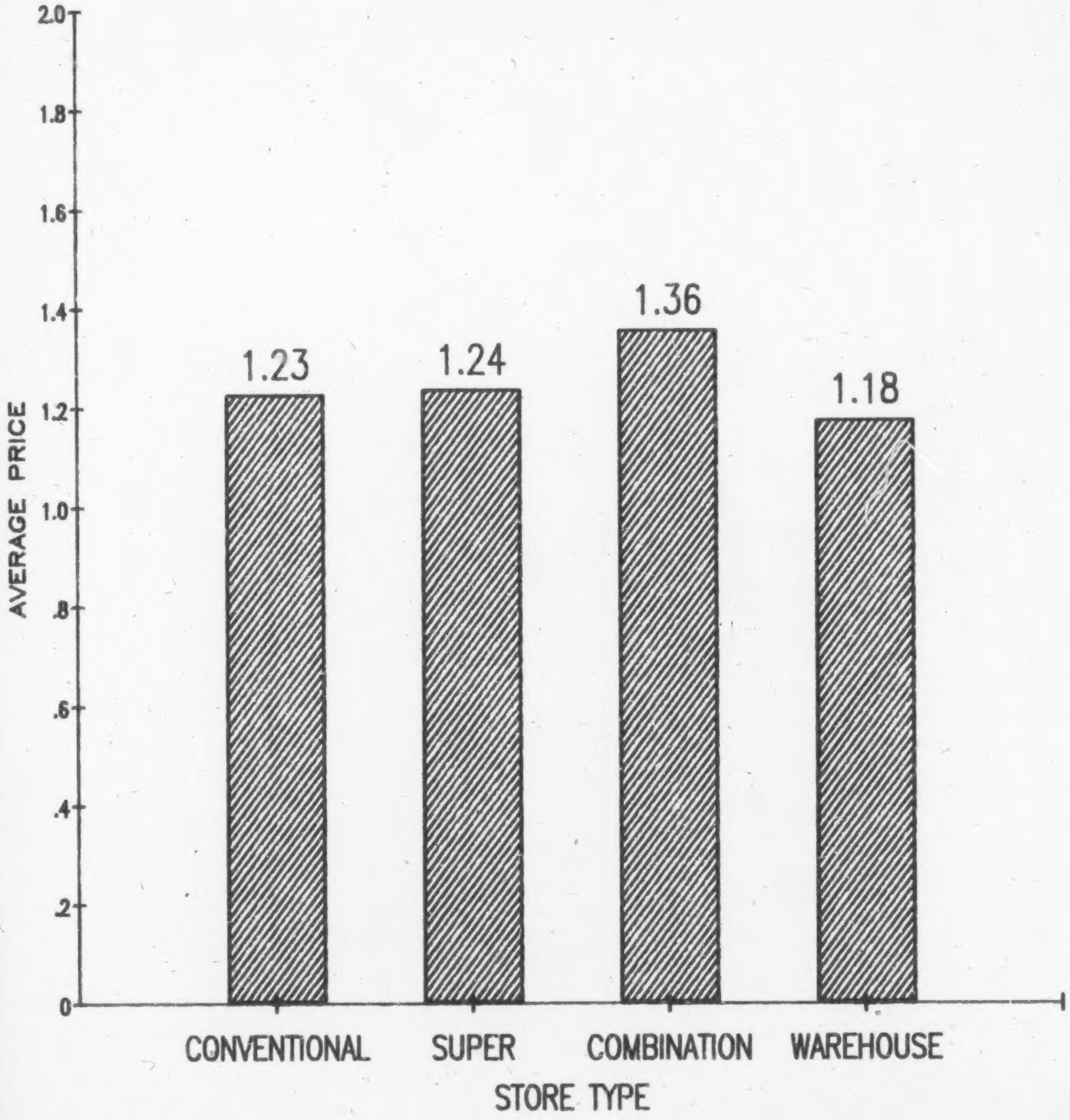
NOTE: DATA WEIGHTED BY NUMBER OF STORES

GRAPH 6
TOTAL SIZE IN SQUARE FEET OF TYPICAL SUPERMARKET



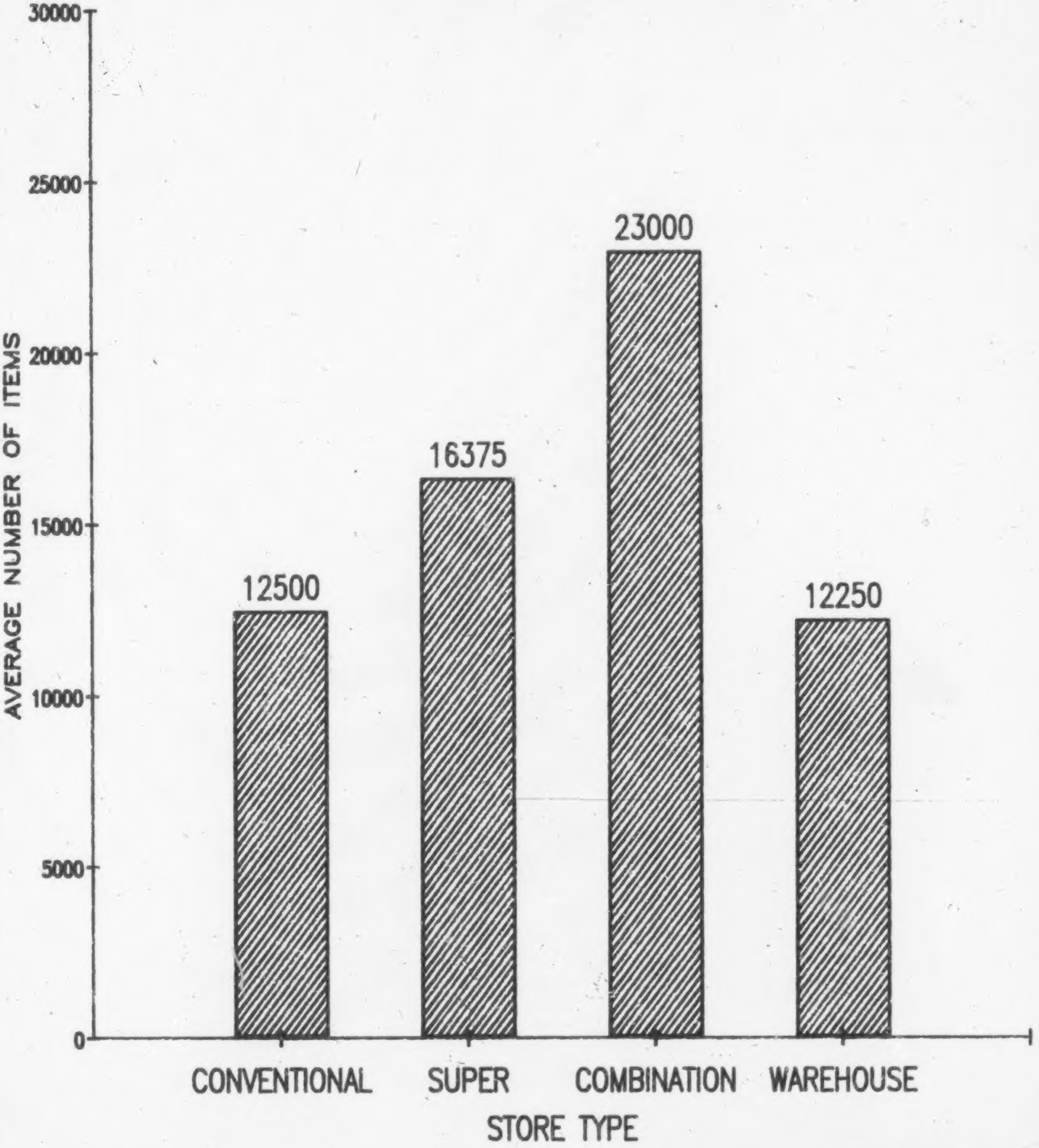
NOTE: DATA WEIGHTED BY NUMBER OF STORES

GRAPH 7
AVERAGE PRICE OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET
(IN DOLLARS)



NOTE: DATA WEIGHTED BY NUMBER OF STORES

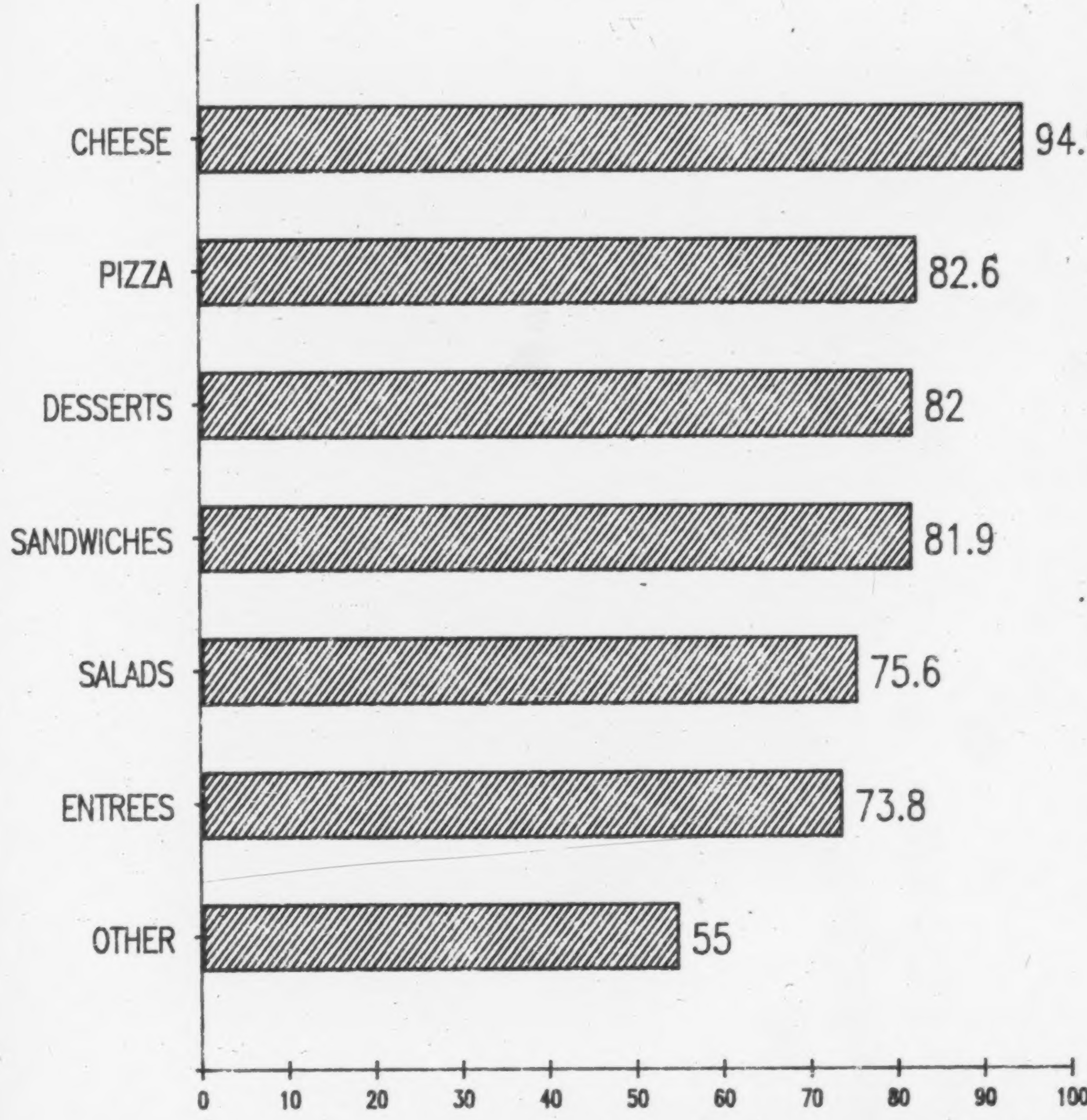
GRAPH 8
AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET



NOTE: DATA WEIGHTED BY NUMBER OF STORES

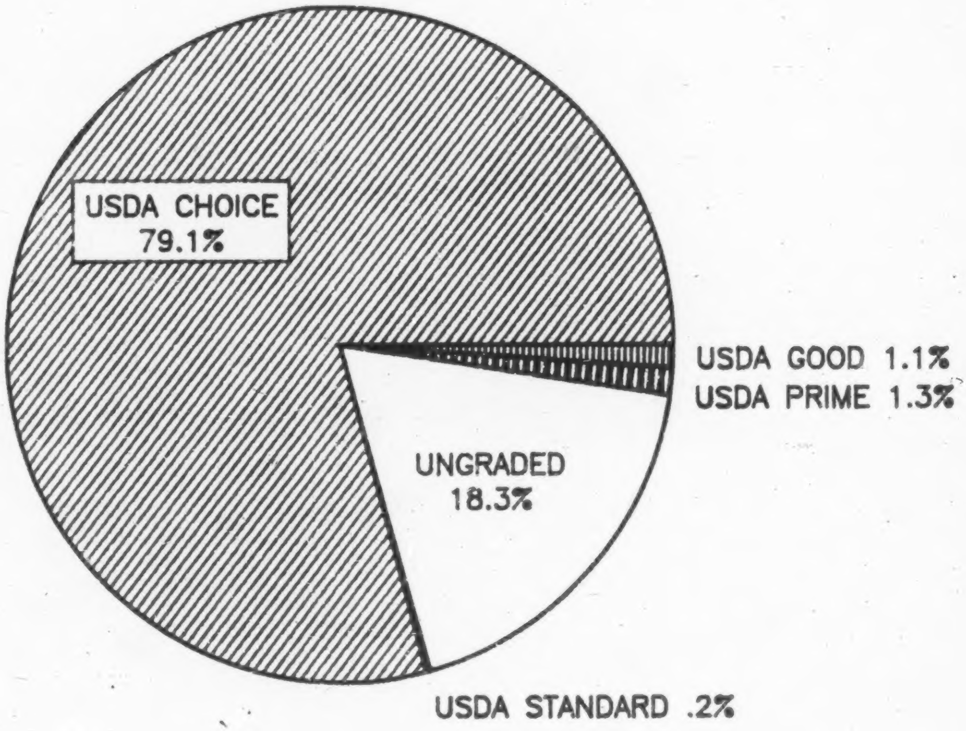
GRAPH 9

PERCENTAGE OF COMPANIES INCLUDING CERTAIN PRODUCTS IN THEIR DELI DEPARTMENT



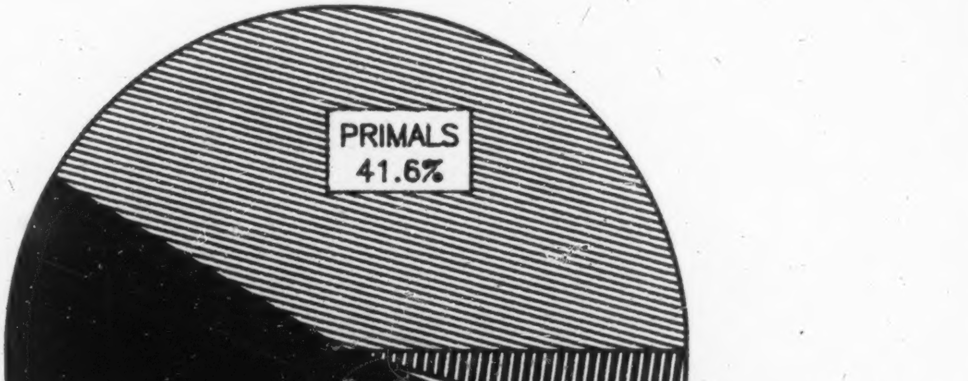
NOTE: DATA WEIGHTED BY NUMBER OF STORES (N=6718)

GRAPH 10
PERCENTAGE OF FRESH BEEF SALES BY TYPE



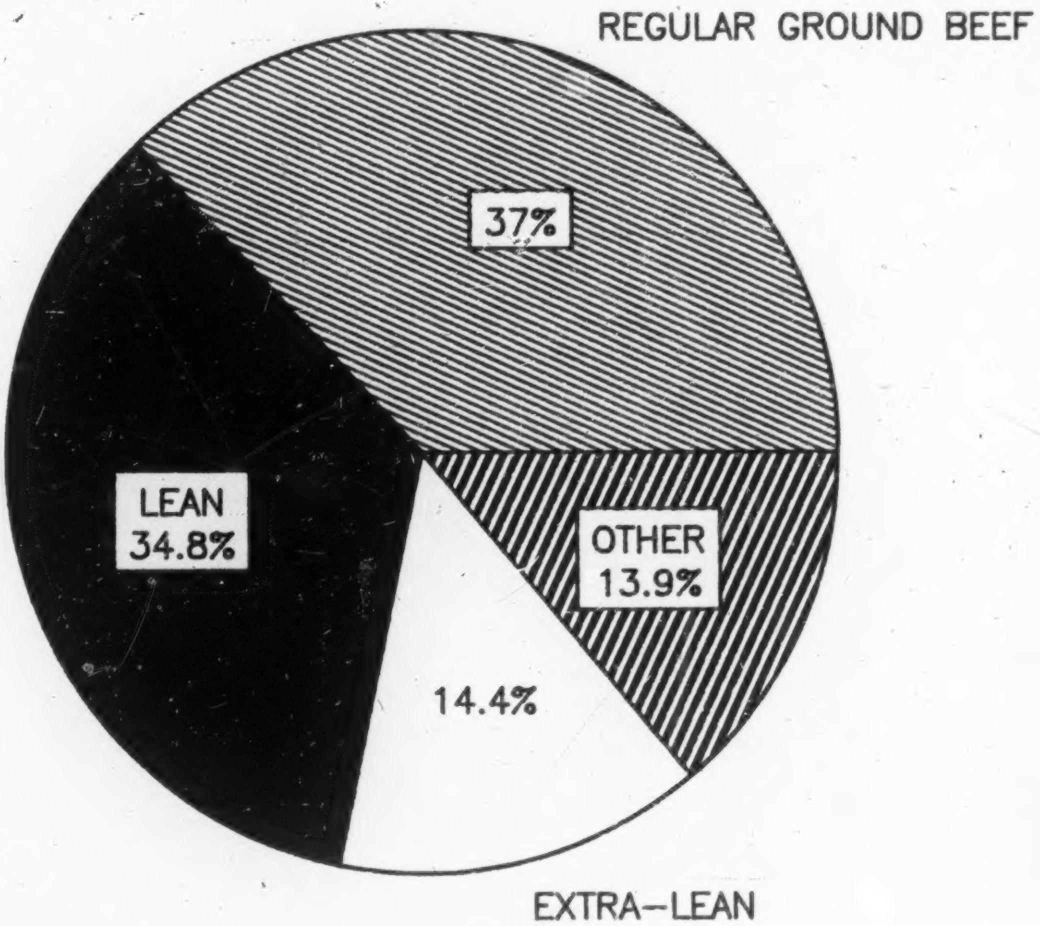
NOTE: DATA WEIGHTED BY NUMBER OF STORES (N=7109)

GRAPH 11
PERCENTAGE OF FRESH BEEF CUTS RECEIVED AT STORES AS:



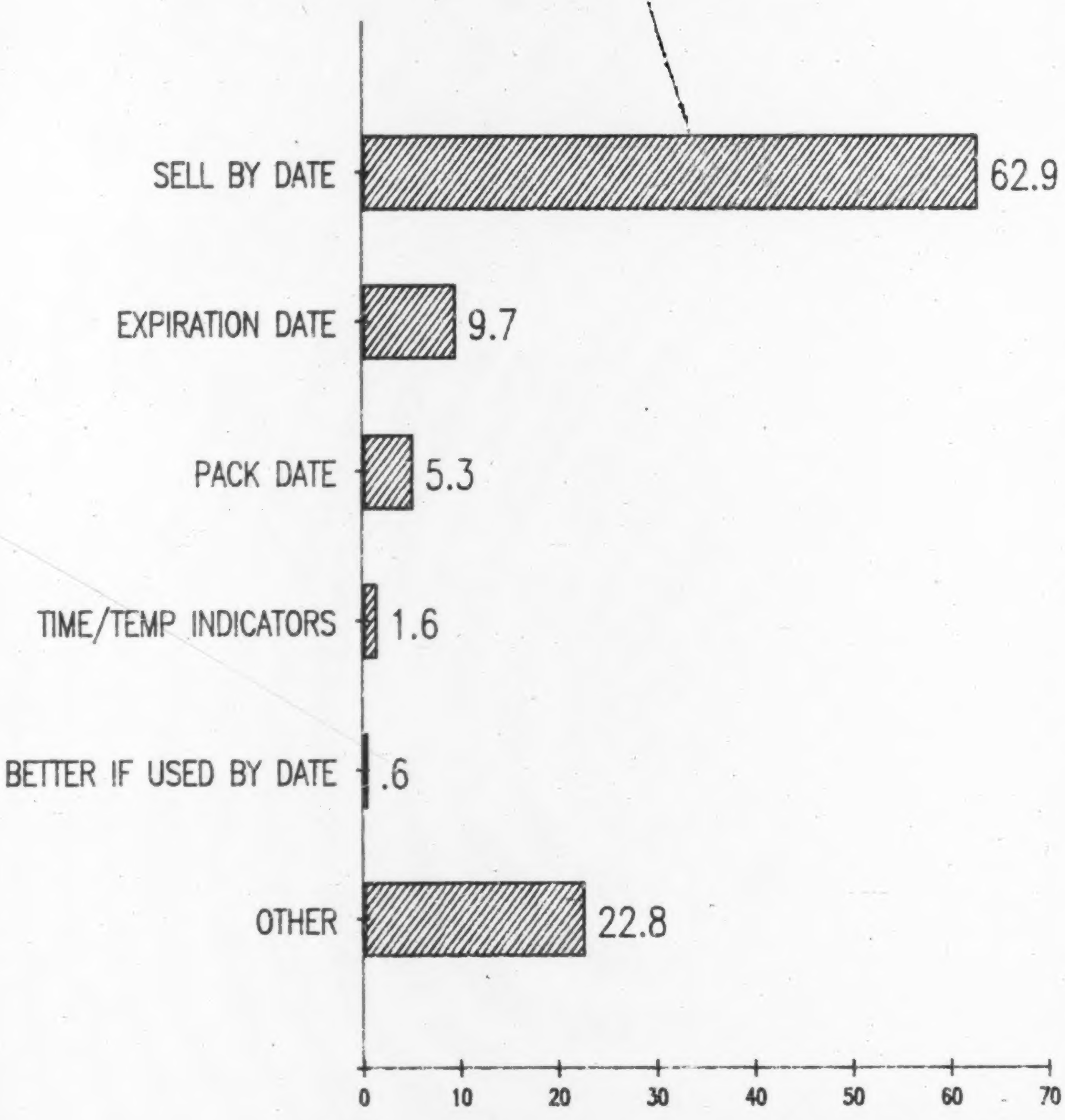
NOTE: DATA WEIGHTED BY NUMBER OF STORES (N=7194)

GRAPH 12
PROPORTION OF TOTAL GROUND BEEF SALES BY TYPE



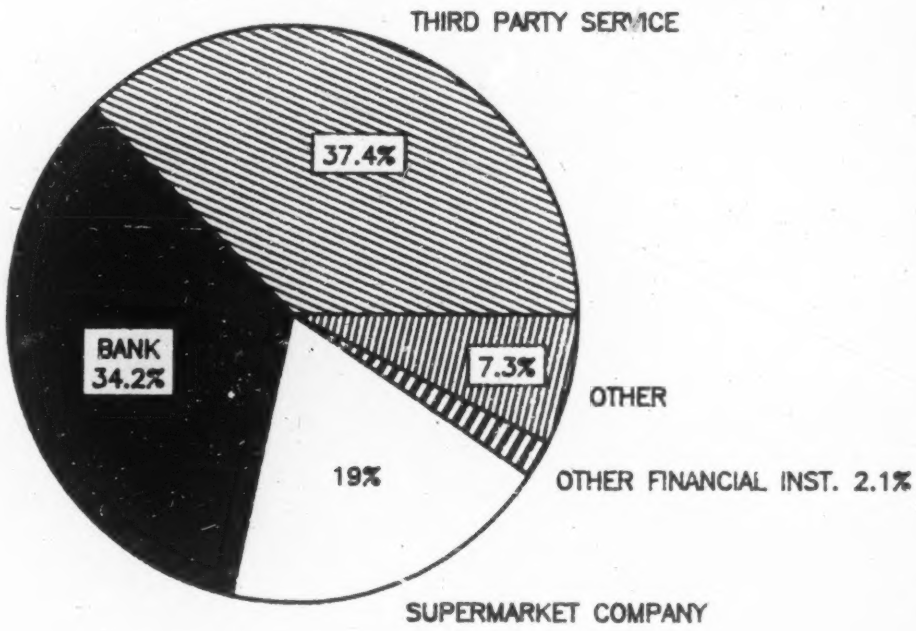
NOTE: DATA WEIGHTED BY NUMBER OF STORES (N=7198)

GRAPH 13
OPEN DATING PRACTICES USED FOR FRESH SEAFOOD ITEMS
(PERCENT OF STORES USING)



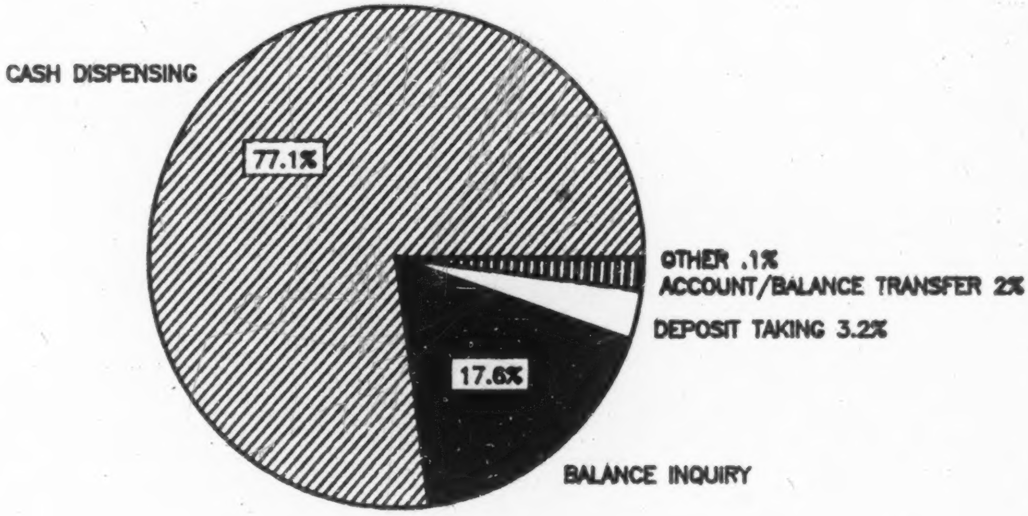
NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING FRESH SEAFOOD (N=5467)

GRAPH 14
OWNERS OF AUTOMATIC TELLER MACHINES
(PERCENT OF MACHINES)



NOTE: UNWEIGHTED DATA (MACHINES—1983)

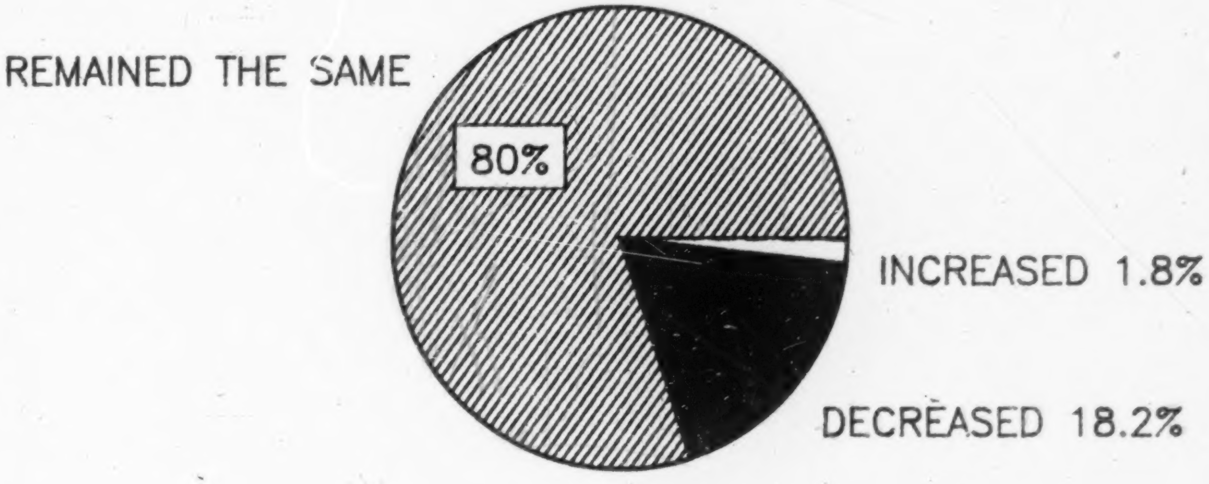
GRAPH 15
MIXTURE OF ATM TRANSACTIONS



NOTE: DATA WEIGHTED BY NUMBER OF ATM MACHINES (N=1157)

GRAPH 16

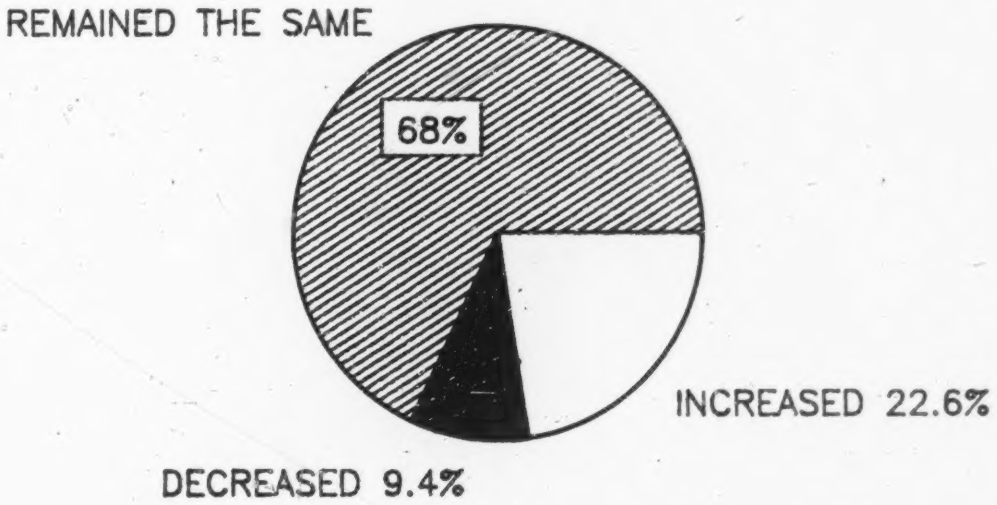
EFFECT OF ATM ON CHECK VOLUME AT CHECKOUT



NOTE: UNWEIGHTED DATA (COMPANIES= 55)

GRAPH 17

EFFECT OF ATM ON CASH VOLUME AT CHECKOUT



NOTE: UNWEIGHTED DATA (COMPANIES= 53)

Definitions

Chain	Retailers with eleven (11) or more supermarkets.
Delivery Cost	The total amount of delivery expense charged to the retail store operation, including salaries, fringe benefits including payroll taxes, equipment depreciation and rental, taxes and licenses, insurance, repairs, gas and oil, and operating supplies.
Fringe Benefits	The company's share of payroll taxes (including those payable under the Federal Insurance Contribution Act, state and federal unemployment compensation, Workers' Compensation), holiday and vacation pay, group insurance, pension, profit sharing, retirement, severance pay, and bonus unless it is a significant amount paid on a regular, recurring basis.
Identical Stores	Supermarkets in operation throughout the entire two-year period, 1983 and 1984.
Independent	Retailers with ten (10) or less supermarkets.
Scratch Rate	Percentage of items ordered from the distribution center but not shipped to the store.
Selling Area	Customer area of the store.
Shortage (Shrink)	Computed using the "retail method," it includes all inventory shortages, including disappearance, spoilage and damaged merchandise for which there is no supplier reimbursement. Shrink is reported at retail value as a percent of sales.
Store Door Margin	Gross profit after any wholesaler's fees minus warehouse, delivery, and headquarter's cost are deducted.
Store Labor Expense	The payment to all store personnel including the store manager, for straight and overtime wages and regular recurring bonus payments. Payments for sickness, absence, excused time off, training and commissions are included in this figure.
Store Rent and Real Estate	Rent paid for store building and parking lot, real estate taxes and insurance and amortization of lease-hold improvement.
Store Supplies	The expense incurred for checkout, wrapping and prepackaging supplies and maintenance supplies for cleaning, window washing, etc.
Supermarket	A retail food store with annual sales of at least $2 million a year.
	Conventional Supermarkets (under 30,000 total sq. ft.).
	Super Stores (over 30,000 total sq. ft., expanded food and non-food selection).
	Combination Stores (over 30,000 total sq. ft. and at least 25% of area in General Merchandise).
	Limited Assortment Stores (carries less than 1000 items and offers few if any perishables with a "no frills" shopping environment).
	Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service).

Utilities Expense The cost for heating, light, water and power.

Warehouse Cost The total amount of warehouse expense charged to the retail store operation, including such items as salaries, fringe benefits, warehouse rental, equipment rental or depreciation, utility cost and supplies.

Wholesaler A company which reported wholesale sales in 1984 to supermarkets, institutions and/or businesses other than those owned by the company and primarily engaged in selling a general line of food and related products to food stores.

A. Cooperative:
(Independent)—Retailers who are stockholder members of cooperative wholesale buying groups.

B. Voluntary:
(Independent)—Retailers who belong to voluntary merchandising groups sponsored by wholesalers and who operate under a common name.

C. Unaffiliated:
(Independent)—Retailers who are not affiliated with either wholesale, cooperative or voluntary merchandising groups sponsored by wholesalers.

Region The geographic area in which the company headquarters is located. Listed below are the states which fall into each region.

Northeast
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Middle Atlantic
New Jersey
New York
Pennsylvania

East North Central
Illinois
Indiana
Michigan
Ohio
Wisconsin

West North Central
Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southeast
Alabama
Delaware
District of Columbia
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

West South Central
Arkansas
Louisiana
Oklahoma
Texas

Mountain
Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Pacific
Alaska
California
Hawaii
Oregon
Washington

Canada

0904A

THE FMI DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE 1985

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence.

If you have any questions, please call the research department of FMI - (202)452-8444.

A. General Operations

1. Is your company primarily a: (Please circle one.)

retailer? 1
cooperative wholesaler? 2
voluntary wholesaler? 3
unaffiliated wholesaler? 4

2. What were your company sales in (if 1984 figures are not yet available, please give an estimate):

a. 1983? . . . . $ ______________ million
b. 1984? . . . . $ ______________ million

3. How many supermarkets does your operation serve/own (a supermarket is a retail food store with annual sales of at least two million dollars)?

a. own? . . . . __________ supermarkets
b. serve as a wholesaler? . . . . __________ supermarkets

4. What percentage of your total annual shipping volume in dollars is attributed to:

a. corporately owned stores? . . . . _ _ _._ %
b. independent food stores? . . . . _ _ _._ %
c. other food chains? . . . . _ _ _._ %
d. convenience stores? . . . . _ _ _._ %
e. restaurants? . . . . _ _ _._ %
f. hospitals? . . . . _ _ _._ %
g. schools? . . . . _ _ _._ %
h. other, please specify ______________________ _ _ _._ %

TOTAL 1 0 0 . 0 %

B. Microcomputer Use

5. Does your company use microcomputers in the distribution center? ☐ Yes ☐ NO If no, please skip to #8. Microcomputers are single user/single task systems.

6. Please check how you are currently using your microcomputers at your warehouse(s).

☐ Order Processing
☐ Word Processing
☐ Shelf Labels/Talkers
☐ Productivity Control
☐ Energy Management
☐ Others, please specify....... ______________________ ______________________

☐ Inventory Control
☐ Spread Sheet Analysis
☐ As Smart Terminals
☐ Program Development for Main Frame
☐ Order Entry from Store

☐ Labor Standards
☐ Payroll
☐ Labor Scheduling
☐ Control Warehouse Mechanism
☐ Space Management

7. Are the majority of your microcomputers operating in a network? ☐ Yes ☐ No

C. Dry Grocery Distribution Center/Section (excluding Cigarettes)

8. Please complete a separate line for each of your Dry Grocery distribution centers/sections:

Dry Grocery Distribution Center/ Section	Total Area in Sq. Ft.*	Type of Selection Method** (Circle)	Total No. of Employees in Distribution Center/ Section***	Average No. of Cases Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per Day	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate ****	Average No. of Inbound Truck Loads Per Week
#01		A B C							__.__ %	
#02		A B C							__.__ %	
#03		A B C							__.__ %	
#04		A B C							__.__ %	
#05		A B C							__.__ %	
#06		A B C							__.__ %	

Footnotes

*Total areas includes everything under roof such as receiving, storage and offices which are involved with Dry Grocery Distribution Center. Exclude manufacturing and parking.

**Select one primary method per center: A, manual selection; B, select to conveyor, or C, automated selection.

D. Frozen Foods Distribution Center/Section

9. Please complete a separate line for each of your distribution centers/sections:

Frozen Foods Distribution Center/ Section	Total Area in Sq. Ft.*	Type of Selection Method** (Circle)	Total No. of Employees in Distribution Center/ Section***	Average No. of Cases Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per Day	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate ****	Average No. of Inbound Truck Loads Per Week
#01		A B C							__.__ %	
#02		A B C							__.__ %	
#03		A B C							__.__ %	

Footnotes

*Total area includes everything under roof such as receiving, storage and offices which are involved with Frozen Foods Distribution Center. Exclude manufacturing and packing.

**Select one primary method per center. A, manual selection; B, select to conveyor, or C, automated selection.

Average No. of Inbound Rail Cars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No.of Cases Stored and Replenished Per Direct Labor Hour*****	Average No.of Cases Selected Per Direct Labor Hour *****	Average No. of Cases Shipped Per Direct Labor Hour *****	Average No. of Cases Shipped Per Total Labor Hour ***	Average No. of Orders Processed Per Week	Average No. of Cases Received Per Direct Labor Hour *****	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
									Yes No
									Yes No
									Yes No
									Yes No
									Yes No
									Yes No

***Please include all full-time Dry Grocery center employees, supervisors, loaders, maintenance, cleaners, clerical, etc., who work in in each section. This includes direct and indirect labor.

****Scratch rate is the percentage of items ordered but not shipped to the store.

*****Only include direct labor hours used to perform that specific task. Direct labor is labor used to physically move merchandise through warehouse.

Average No. of Inbound Rail Cars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No. of Cases Stored and Replenished Per Direct Labor Hour *****	Average No. of Cases Selected Per Direct Labor Hour *****	Average No. of Cases Shipped Per Direct Labor Hour *****	Average No. of Cases Shipped Per Total Labor Hour ***	Average No. of Orders Processed Per Week	Average No. of Cases Received Per Direct Labor Hour *****	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
									Yes No
									Yes No
									Yes No

*** Please include all full-time and part-time Frozen Foods Distribution Center employees, supervisors, loaders, maintenance, cleaners, clerical, etc., who work in the Frozen Foods distribution center/section. If personnel works in more than one section, please estimate the employees by fraction of time spent in each section. This includes direct and indirect labor.

**** Scratch rate is the percentage of items ordered but not shipped to the store.

***** Only include direct labor hours used to perform that specific task. Direct labor is labor used to physically move merchandise through warehouse.

E. Incentives Programs in the Distribution Center

10. Do you offer incentives associated with work productivity for:

salaried warehouse employees............ ☐Yes ☐No
non-salaried warehouse employees........ ☐Yes ☐No
truck drivers........................... ☐Yes ☐No

IF YOU DO NOT OFFER ANY INCENTIVE PROGRAMS PLEASE GO TO QUESTION 14

11. For each of the following distribution center employee groups check all of the incentive programs available to them:

	Salaried Employees	Non-salaried Employees	Drivers
a. Time off with pay	☐	☐	☐
b. Gift awards	☐	☐	☐
c. Special purpose cash awards	☐	☐	☐
d. Year end bonuses	☐	☐	☐
e. Contest awards	☐	☐	☐
f. Annual merit increases	☐	☐	☐
g. Annual performance reviews	☐	☐	☐
h. Public recognition event awards	☐	☐	☐
i. Other ____________	☐	☐	☐
j. Do not offer any incentives for this group	☐	☐	☐

12. What percentage of your company's annual distribution center compensation expense is alloted to incentive programs? ________%

13. What percentage of your total distribution center incentives offered are:

Cash.. ___ ___ ___%
Non-cash (time off, public recognition, etc.)........ ___ ___ ___%
TOTAL.. 1 0 0%

G. Wholesale Operations

If you are a wholesaler, please answer number 14.

14. Does your company provide any of the following services to your retailers (Please circle yes or no):

	Yes	No		Yes	No
a. advertising program	1	2	k. equipment procurement	1	2
b. educational/training program	1	2	l. gross margin report by item	1	2
c. retail accounting service	1	2	m. handle private label	1	2
d. member payroll	1	2	n. handle generic label	1	2
e. individual retail pricing program	1	2	o. discount programs	1	2
f. real estate & store engineering	1	2	p. space allocation	1	2
g. interior decor & design service	1	2	q. scanning support	1	2
h. product movement data	1	2	r. DSD system	1	2
i. equipment and fixture financing	1	2	s. other ____________ (please specify)	1	2
j. lease financing	1	2			

THE FMI RETAIL OPERATIONS QUESTIONNAIRE 1985

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in the supermarket retail operations. We encourage your participation so that the results may be as representative as possible. All data will be held in strictest confidence. Please answer as many questions as possible. You need not complete the entire questionnaire. If you have any questions, please call the Research Department of FMI - (202)452-8444.

A. General Operations

1. How many supermarkets does your company operate (a supermarket is a retail food store with annual sales of at least two million dollars)? . . . . ____________ supermarkets

2. What were your retail supermarket sales in (if 1984 figures are not yet available, please give an estimate):

a. 1983 . . . .$ ________ million

b. 1984 . . . .$ ________ million

3. What were your sales for "identical stores" (those supermarkets which you had in operation throughout the entire two-year period, 1983 and 1984) for:

a. 1983 . . . .$ ________ million

b. 1984 . . . .$ ________ million

4. What percent of your operation is supplied by the following:

a. own warehouse . . . . __ __ __.__ %
b. voluntary wholesaler . . . . __ __ __.__ %
c. cooperative wholesaler . . . . __ __ __.__ %
d. unaffiliated wholesaler . . . . __ __ __.__ %
e. direct vendor deliveries . . . . __ __ __.__ %
TOTAL 1 0 0 . 0 %.

5. What percentage of your total supermarket sales in 1984 is accounted for by: a. General Merchandise . . . __ __.__ %

b. Health and Beauty Aids . . . __ __.__ %

c. Tobacco . . . . __ __.__ %

6. Please provide total company data for the following items:

a. What were your average weekly sales per supermarket in 1984? . . . . $ __,__ __ __,__ __ __

b. What were your average weekly sales per checkout in 1984? . . . . $ __ __,__ __ __

c. What was the average sale per customer transaction for your supermarkets in 1984? . . . .$ __ __.__ __

d. What were your sales per labor hour for store employees in 1984? . . . . $ __ __ __.__ __

6. Please provide total company data for the following items: (Continued from previous page.)

e. What were your average weekly sales per square foot of selling area in 1984 (divide average weekly sales for all your supermarkets in operation the entire year by the number of square feet of selling area - customer area - in those stores)? . . . . $ __ __.__ __

f. What is the total size, in square feet, of your typical store? . . . . __ __ __,__ __ __ (square feet)

g. What is the average retail price per item for all items sold in your supermarket during December, 1984? . . . . $ __.__ __

h. On average, how many different items does your typical supermarket carry (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item)? . . . . __ __,__ __ __ number of items

7. Please complete the following chart for each type of store you operate. If you do not operate a particular store type, enter NA.

	Conventional Supermarkets (30,000 and under total sq. ft.)	Super Stores (over 30,000 total sq. ft., expanded food and non-food selection)	Combination Stores (over 30,000 total sq.ft., and at least 25% of area in General Merchandise)	Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices)
Number of Each Type of Store	______________	______________	______________	______________
Average Weekly Sales per Store	$__ __ __,__ __ __	$__ __ __,__ __ __	$__ __ __,__ __ __	$__ __ __,__ __ __
Average Weekly Sales per Checkout	$__ __,__ __ __	$__ __,__ __ __	$__ __,__ __ __	$__ __,__ __ __
Average Sales per Customer Transaction	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __
Sales per Labor Hour	$__ __ __.__ __	$__ __ __.__ __	$__ __ __.__ __	$__ __ __.__ __
Average Weekly Sales per Sq. Ft. of Selling Area	$__ __.__ __	$__ __.__ __	$__ __.__ __	$__ __.__ __
Average Total Size in Sq. Ft.	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __
Average Retail Price per Item	$ __.__ __	$ __.__ __	$ __.__ __	$ __.__ __
Average Number of Items Carried	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __

B. Merchandising

8. In how many supermarkets are you currently using the following promotional techniques:

a. trading stamps? . . . . ___________ supermarkets
b. games? . . . . ___________ supermarkets
c. continuity programs? . . . . ___________ supermarkets
d. in-store coupons? . . . . ___________ supermarkets

9. What percentage of your total sales was spent on advertising by the company? . . . . __.__ %

10. What percentage of your advertising budget was spent on:

a. newspaper? . . . . __ __ __.__ %
b. radio? . . . . __ __ __.__ %
c. television? . . . . __ __ __.__ %
d. mailer/flyer? . . . . __ __ __.__ %
e. in-store coupons? . . . . __ __ __.__ %
f. billboards? . . . . __ __ __.__ %
g. other? . . . . __ __ __.__ %
TOTAL 1 0 0 . 0 %

11. How many of your supermarkets are presently accepting credit cards:

a. for grocery items? . . . . ___________ supermarkets
b. for pharmaceutical items and/or
non-foods? . . . . ___________ supermarkets

C. Scanning

Please check here if you do not have any scanners /_/ and skip to question 17.

		Yes	No
12.	By the end of 1984, will your company be 100% scanning? (Please circle).	1	2

13. In how many stores are you now scanning? . . . . ___________ supermarkets

14. In how many stores are you scanning random weight items? . . . . ___________ supermarkets

15. In which of the following ways are you currently using your scanning POS data (Please circle yes or no):

	Yes	No		Yes	No
a. checker performance . . .	1	2	g. meat department analysis	1	2
b. coupon accounting	1	2	h. produce department analysis.	1	2
c. specials	1	2	i. new product evaluation	1	2
d. work scheduling	1	2	j. price elasticity	1	2
e. shrink analysis	1	2	k. reordering	1	2
f. shelf allocation	1	2	l. other, please specify ________________ ________________________________	1	2

		Yes	No
16.	Do you have someone specifically responsible for the analysis of scanning data?	1	2

Customer Services

17. In how many supermarkets are you currently operating a:

a. deli offering carry-out items? . . ________supermarkets
b. restaurant? . . . . ________supermarkets
c. lunch counter/snack bar? . . . . . ________supermarkets
d. floral/plant shop? . . . . ________supermarkets

e. beer? . . . . ________supermarkets
f. liquor? . . . . ________supermarkets
g. wine? . . . . ________supermarkets
h. catering? . . . . ________supermarkets
i. salad bar? . . . . ________supermarkets

j. service meat? . . . . ________supermarkets
k. fresh seafood? . . . . ________supermarkets
l. pharmacy? . . . . ________supermarkets
m. scratch and/or bake-off bakery?________supermarkets

n. reading center? . . . . ________supermarkets
o. cosmetic center? . . . . ________supermarkets
p. photographic service center? . ________supermarkets
q. courtesy booth? . . . . ________supermarkets
r. video rental?. . . . . ________supermarkets

D. Bulk Foods

18. In 1984, in how many supermarkets did you sell bulk food items? . . . . ____________supermarkets
(Please exclude the produce department).

If you did not carry bulk food items, please check here / / and skip to the bottom of the page.

19. For those stores which handle bulk how many bulk items are typically carried? . . . . . __,__ __ __ per supermarket

RETAIL MEAT OPERATIONS QUESTIONNAIRE 1985

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket meat operations. We encourage your participation so that the results will be as representative as possible. Please answer as many questions as you can. All data will be held in strictest confidence. This questionnaire has been reviewed and approved by FMI General Counsel. If you have any questions, please call the Research Department of FMI - (202) 452-8444.

1. What percentage of your fresh beef sales are: U.S.D.A.: prime .... ___ ___ ___ %
choice .... ___ ___ ___ %
ungraded or house brand .... ___ ___ ___ %
good .... ___ ___ ___ %
standard .... ___ ___ ___ %
TOTAL 1 0 0 %

2. What percentage of poultry volume is government graded? .... ___ ___ ___ %

3. What percentage of your meat sales are boneless vs. bone-in?

CHICKEN: Boneless .... ___ ___ ___ %
Bone-in .... ___ ___ ___ %
TOTAL 1 0 0 %

PORK: Boneless .... ___ ___ ___ %
Bone-in .... ___ ___ ___ %
TOTAL 1 0 0 %

BEEF: Boneless .... ___ ___ ___ %
Bone-in .... ___ ___ ___ %
TOTAL 1 0 0 %

4. What percentage of your meat cuts are received at your stores as:

FRESH BEEF: carcass (sides, quarters) .... ___ ___ ___ %
primals .... ___ ___ ___ %
subprimals .... ___ ___ ___ %
consumer ready retail cuts .... ___ ___ ___ %
TOTAL 1 0 0 %

CHICKEN: ice pack, whole .... ___ ___ ___ %
ice pack, parts .... ___ ___ ___ %
chill pack, whole .... ___ ___ ___ %
chill pack, prime parts .... ___ ___ ___ %
other .... ___ ___ ___ %
TOTAL 1 0 0 %

TURKEY: whole, frozen .... ___ ___ ___ %
whole, fresh .... ___ ___ ___ %
parts, fresh .... ___ ___ ___ %
parts, frozen .... ___ ___ ___ %
other(processed such as roasts) .... ___ ___ ___ %
TOTAL 1 0 0 %

5. What percentage of your ground beef is ground in the store? .... ___ ___ ___ %

6. What percentage of your ground beef sales are: regular ground beef .... ___ ___ ___ %
lean ground beef .... ___ ___ ___ %
extra-lean ground beef .... ___ ___ ___ %
other .... ___ ___ ___ %
TOTAL 1 0 0 %

7. What percent of your ground beef sales comes from each of the following groups?

chub packs.................................... ___ ___ ___ %
film wrapped trays............................ ___ ___ ___ %
pre-formed frozen patties..................... ___ ___ ___ %
other... ___ ___ ___ %
TOTAL 1 0 0 %

8. What percentage of your fresh meat volume is received at your stores packaged as:

BEEF:
vacuum packaged.bone-in....................... ___ ___ ___ %
vacuum packaged boneless sub-primal parts..... ___ ___ ___ %
vacuum packaged boneless retail cuts.......... ___ ___ ___ %
soft-film overwrapped......................... ___ ___ ___ %
other... ___ ___ ___ %
TOTAL 1 0 0 %

PORK:
vacuum packaged boneless retail cuts.......... ___ ___ ___ %
soft-film overwrapped......................... ___ ___ ___ %
other... ___ ___ ___ %
TOTAL 1 0 0 %

9. What percentage of meat for your supermarkets is supplied by:

company-owned warehouse/processing plant...... ___ ___ ___ %
packer direct deliver......................... ___ ___ ___ %
wholesaler direct deliver..................... ___ ___ ___ %
TOTAL 1 0 0 %

10. What percentage of fresh beef is sold at retail as:

conventional retail cuts/packaging............ ___ ___ ___ %
subprimal, vacuum packaged.................... ___ ___ ___ %
subprimal, non-vacuum packaged................ ___ ___ ___ %
TOTAL 1 0 0 %

11. Do you sell frozen red meat (excluding frozen meat patties, thinly sliced steaks, etc.)?............ ☐ yes ☐ no

12. Is your deli department included as part of the meat department?.... ☐ Yes
(Please check only one)
☐ No, deli in another department
☐ Do not have any delis (GO TO Question 14)

13. In addition to meat products, which of the following products are included in your typical deli department?
(check as many as apply)

☐ entrees ☐ pizza ☐ sandwiches ☐ other______________
☐ cheese ☐ salads ☐ desserts

14. On the average, how many packer brands of each of the following items does your meat department carry?

boneless hams................................. ________ brands
weiners/franks................................ ________ brands
bacon... ________ brands

15. Please check which of the following are available to your customers (check as many as apply):

meat recipes.......................... ☐
store coupons for meat items.......... ☐
nutrition information................. ☐
other_____ ___ ____ _____.. ☐

cooking classes involving meat....... ☐
meat cutting charts/explanations..... ☐
customer meat information center..... ☐

16. What percentage of your total retail sales in 1984 was accounted for by the meat department?.......___ ___._ _%

17. In your meat department in 1984, what was the average number of employees per store, including the department manager?..___ _ employees

18. What percentage of meat department sales in 1984 were accounted for by labor costs? (include wages and fringe benefits)...___ ________%

19. In 1984, what were your total meat sales per labor hour for meat department employees, including the department manager?...$___ ___ ___

20. In 1984, what were your average pounds per man hour for the meat department?..........................____________lbs

21. In your typical store, what percentage of total selling area - "customer area" - is devoted to:

TOTAL MEAT DEPARTMENT...___ ___ ___ %
Fresh meat display...___ ___ ___ %
Processed meat display...___ ___ ___ %
Frozen meat display...___ ___ ___ %

22. In a typical store, what percentage of total store area is devoted to meat receiving, preparation and storage (not including display)? ....___ ___ ___ %

23. What percentage of your meat sales are:

service meats................................___ ___ ___ %
self-service meats.........................___ ___ ___ %
TOTAL 1 0 0 %

24. On the average, how many different fresh meat items does your meat department carry in its display case?...________ _items

25. Please check all of the point-of-purchase displays which you use to promote meat products:

/_/recipes
/_/posters
/_/mobiles
/_/package labels
/_/rail strips
/_/other___ ____ _______

26. What percentage of your typical meat department sales is:

FRESH:

meat: beef..........___ ___ ___ %
pork..........___ ___ ___ %
veal..........___ ___ ___ %
lamb..........___ ___ ___ %
Total for meat ___ ___ ___ %
poultry...___ ___ ___ %
fish and seafood................................___ ___ ___ %
other...___ ___ ___ %

PROCESSED/FROZEN:

bacon...___ ___ ___ %
ham...___ ___ ___ %
other cured pork.................................___ ___ ___ %
packaged luncheon meat.......................___ ___ ___ %
delicatessen(any items).......................___ ___ ___ %
franks/weiners....................................___ ___ ___ %
cheese...___ ___ ___ %
frozen meat..___ ___ ___ %
frozen fish...___ ___ ___ %
other...___ ___ ___ %
TOTAL 1 0 0 %

27. Please indicate, your open dating practices for meat, by checking the appropriate boxes:

Sell by Date	Better if Used by Data	Expiration Date	Pack Date	Do Not "Open Date"
Fresh Cut Meat.........				
Private label, Pre-packaged, Processed Meat.......				

28. Does your company have an:
on-the-job training program for meat department employees........☐ yes ☐ no
off-the-job training program for meat department employees.......☐ yes ☐ no

29. On the average, how many linear feet of the following types of meat cases are included in your most recent standard store plans:
single deck fresh meat..___ ___linear ft.
single deck frozen meat.......................................___ ___linear ft.
multi-deck fresh meat...________linear ft.
processed meat case(3 deck)...................................________linear ft.
processed meat case(5 deck)...................................________linear ft.
other__________________________________ ....___ ___linear ft.

30. What percentage of your meat products are scanned?...........
☐ Do not have scanners
☐ Have scanners, but do not scan meat products
☐ Scan ___ ___ ___% of our meat products

FACTUAL INFORMATION

31. What do you estimate your annual total company food sales will be for 1984 (approximately)? $______________million

32. What is the total number of supermarkets you will have in operation at the end of 1984?.........__________supermarkets
(Supermarkets are those food stores with $2 million of annual sales.)

THE FMI RETAIL FISH AND SEAFOOD OPERATIONS QUESTIONNAIRE 1985

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket seafood operations. We encourage your participation so that the results may be as representative as possible. Please answer as many questions as possible. You need not complete the entire questionnaire. All data will be held in strictest confidence.
If you have any questions, please call the Research Department of FMI - (202) 452-8444.

1. How many supermarkets in your company carry: Frozen Seafood__________stores Fresh Seafood__________stores

If none of your supermarkets carry any fresh seafood, please skip to question 18.

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2. What is the size of your average supermarket:
   - with fresh seafood ______________square feet
   - without fresh seafood ______________square feet

3. What percentage of your total retail sales in 1984 was accounted for by:
   - Fresh seafood....... __ . __ __%
   - Frozen seafood....... __ . __ __%
   - Other seafood, please explain______________ __ . __ __%
   - TOTAL SEAFOOD.... __ . __ __%

4. What percentage of your total retail seafood sales are accounted for by:
   - Frozen seafood.............. __ __ __%
   - Fresh seafood............... __ __ __%
   - Other seafood, please explain______________ __ __ __%
   - TOTAL SEAFOOD.... 1 0 0%

5. Are your seafood items included as: (check as many as apply)

FRESH SEAFOOD		FROZEN SEAFOOD
☐	......The seafood department............	☐
☐	......Part of the meat department.......	☐
☐	......Part of another department........	☐
☐	......Other,____________________......	☐

6. What percentage of your fresh seafood section is:
   - Self-service seafood............ __ __ __%
   - Service seafood................. __ __ __%
   - TOTAL....................... 1 0 0%

7. What is the average gross margin of the total seafood section and by type of product?......
   - Total seafood Department........ __ __ . __%
   - Fresh seafood .... __ __ . __%
   - Frozen seafood.................. __ __ . __%
   - Other seafood, please explain______________ _____ . __%

8. How many linear feet of your food cases are devoted to:
   - Fresh seafood.......... __________linear ft.
   - Frozen seafood......... __________linear ft.

9. Do you offer any special training for employees handling fresh seafood?................
   - ☐ yes
   - ☐ no

10. In your fresh seafood section, what is the average number of employees per store devoted solely to seafood?

______________number of full time employees
______________number of part time employees
______________number of employees shared with another department

11. On average, how many different seafood items does your typical store carry?

____________number of fresh seafood items
____________number of frozen seafood items
____________number of other seafood items
____________......TOTAL

12. Please indicate what type(s) of open dating practices you use for fresh seafood items: (check as many as apply)

☐ Sell-by date
☐ Better if used by date
☐ Pack date
☐ Time/Temperature indicators
☐ Other(please explain) ____________
☐ Expiration date
☐ Do not "open date"

13. Please check what types of prepackaging of fresh seafood your stores use: (check as many as apply)

☐ PVC overwrap on a styrofoam package
☐ Thermoform
☐ Vacuum packages
☐ Other(please explain) ____________________

14. Do you offer any prepared seafood dishes in your stores? ☐ No
☐ Yes, please describe ________________________
If yes, in which department are they kept? ________

15. Which of the following seafood services do your stores offer?(check as many as apply)

☐ Cooking demonstrations with seafood
☐ In-store tasting of seafood
☐ Catch of the Week
☐ Posters for seafood
☐ Brochures on seafood
☐ Fish Week
☐ Recipe cards for seafood
☐ Holiday specials with seafood

16. What types of advertising do you use to promote seafood products? (check as many as apply)

☐ Coupons
☐ Radio
☐ Mailer/flyer
☐ Television
☐ In-store advertising
☐ Newspaper
☐ Other ______________
☐ No advertising done

17. In your average store, what percentage of your fresh seafood products are scanned? (Please check only one)

☐ Do not have scanners
☐ Have scanners, but do not scan fresh seafood
☐ Scan ________% of our fresh seafood products

General Operations

18. What is the total number of supermarkets you will have in operation by the end of 1984?....__________Stores

19. What do you estimate your annual total company food sales will be for 1984?.................$__________million

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ELECTRONIC FUNDS TRANSFER
1985

This questionnaire is part of an annual FMI industry study. It is designed to explore the use of Automated Teller Machines and other non-ATM financial devices in supermarkets. Please answer as many questions as you can. You need not answer all questions. All data will be held in strictest confidence. If you have any questions, please call the Research Department of FMI -- (202)452-8444.

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1. Does your company operate any of the following Electronic Financial Services in its supermarkets?

A. Automated Teller Machines ..../ / No / / Yes, in how many supermarkets ____________
how many total machines ____________

B. Non-ATM electronic financial devices.../ / No / / Yes, in how many supermarkets ____________
(e.g. clerk operated payment/voucher systems)

C. EFT-POS, direct debit at the checkout../ / No / / Yes, in how many supermarkets ____________

2. Do you expect your company to install any of the following systems in any of your stores within:

the next 2 years?

	YES	NO	Already Have		YES	NO	Already Have		YES	NO	Already Have
ATM	1	2	3	Non-ATM Electronic Financial Service	1	2	3	EFT-POS System (Direct Debit at Checkout)	1	2	3

the next 5 years?

	YES	NO	Already Have		YES	NO	Already Have		YES	NO	Already Have
ATM	1	2	3	Non-ATM Electronic Financial Service	1	2	3	EFT-POS System (Direct Debit at Checkout)	1	2	3

If your do not operate ATMs, please go to question 4.

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3. Please answer the following questions only if your company operates Automated Teller Machines.
Do NOT answer for non-ATM terminals.

A. On average, how many transactions do the machines average?....___,___ ___ ___ transactions/machine/week

B. What percentage of the transactions were:

a. Cash Dispensing/Withdrawals..___ ___ ___ %
b. Deposit Taking..___ ___ ___ %
c. Balance Inquiry..___ ___ ___ %
d. Account/Balance Transfer..___,___ ___ %
e. Other..___ ___ ___ %
TOTAL..................1 0 0 %

C. Who owns the terminals?

a. Bank.. ______________ machines
b. Other Financial Institution.................... ______________ machines
c. Supermarket Company............................ ______________ machines
d. Third Party Service/Provider................... ______________ machines
e. State Food Association......................... ______________ machines
f. Food Wholesaler................................ ______________ machines
g. Other.. ______________ machines

D. How are you compensated?

/ / Space Rental ______________ machines
/ / Transaction fee ______________ machines
/ / Space & Transaction Fee ______________ machines
/ / Other ______________ machines

E. How has the installation of your ATM effected the volume of checks or cash at your checkout lane?

CHECKS (Please circle one)	CASH (Please circle one)
a. Check Volume Increased	d. Cash Volume Increased
b. Check Volume Decreased	e. Cash Volume Decreased
c. Check Volume Remained the Same	f. Cash Volume Remained the Same

F. On a Scale of 1 to 5, with 1 representing poor and 5 excellent, please rate the operations of the ATMs in your supermarkets.

	Poor				Excellent
a. Overall Performance...........	1	2	3	4	5
b. Customer Acceptance...........	1	2	3	4	5
c. Customer Usage................	1	2	3	4	5
d. Customer Convenience..........	1	2	3	4	5
e. Ease of Use...................	1	2	3	4	5
f. Hardware Reliability..........	1	2	3	4	5
g. Maintenance...................	1	2	3	4	5
h. Store Savings.................	1	2	3	4	5

FACTUAL INFORMATION

4. What do you estimate your annual total company food sales will be for 1984 (approximately)?...$ ______________ million

5. What is the total number of supermarkets you will have in operation at the end of 1984?......... ______________ supermarkets
(Supermarkets are those food stores with $2 million of annual sales.)
